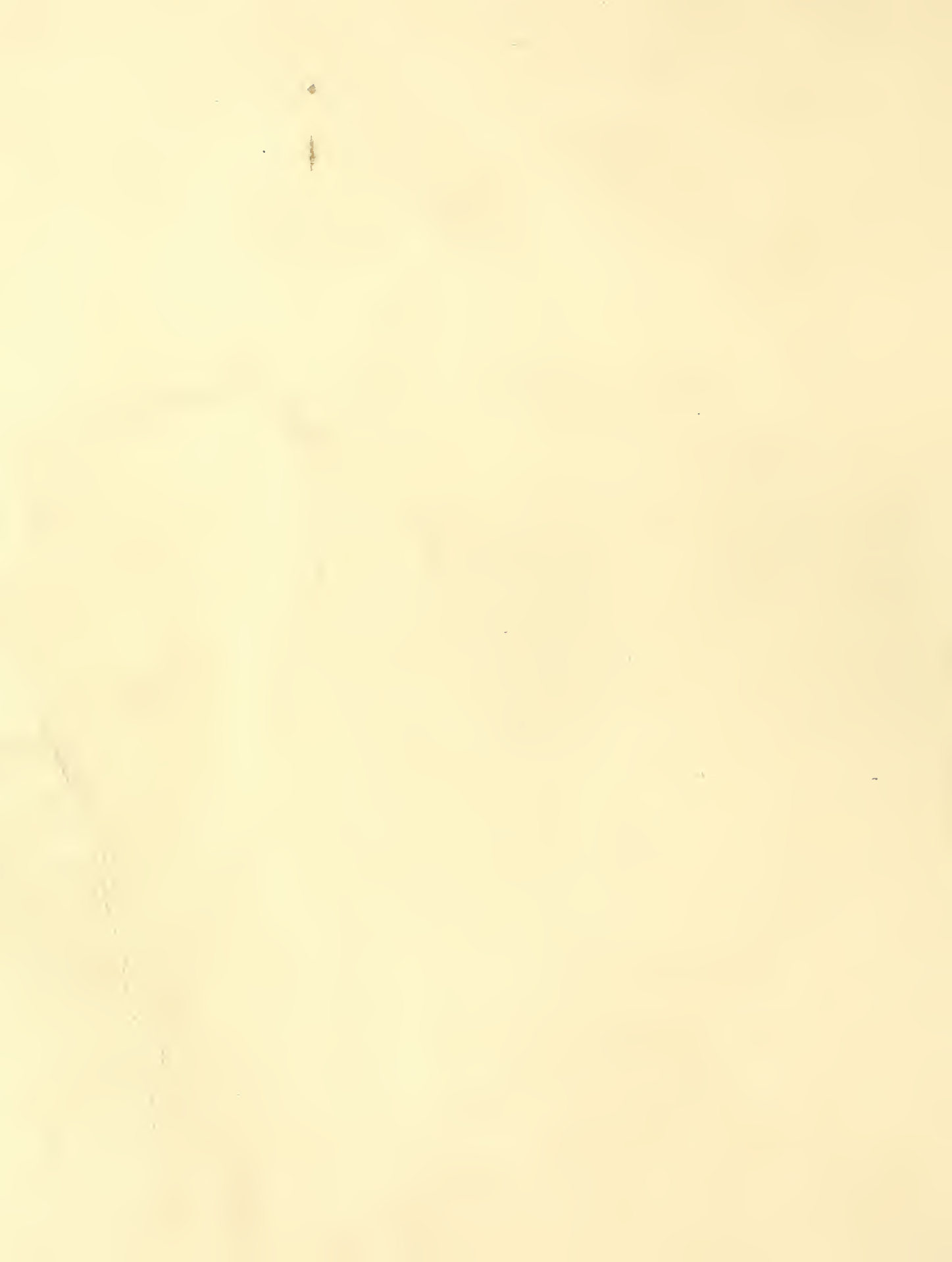


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Effects of Futures Trading on Price Performance
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THE VEGETABLE SITUATION

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Approved by
The Outlook and Situation Board
and Summary released
April 23, 1975

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The *Vegetable Situation* is published in February, May, August, and November.

SUMMARY

Acreage for harvest of 14 spring *fresh market vegetables* is 1 percent larger than the same quarter of 1974. Based on average yields, this would suggest a slightly reduced supply. In addition, a smaller acreage of spring melons implies moderately smaller output.

During the winter quarter of this year, heavier domestic fresh vegetable shipments did not make up for a sharp drop in imports of tomatoes, peppers, and cucumbers from Mexico. Domestic shipments of all important fresh vegetables except carrots and celery were heavier with Florida tomatoes showing the greatest gain. Larger stocks of storage onions contributed to this supply, too.

Farm and retail prices for fresh vegetables likely will hold steady to slightly higher in the second quarter. Some seasonal decline is expected in third quarter 1975.

Processed vegetable supplies have been ample this season. The combination of increased packs and some reduction in demand has eased the tight supply position which prevailed for much of 1974. In response to a generally adequate supply picture, processors handling 8 major vegetable crops expect to contract for 3 percent more vegetable acreage in 1975. These 8 vegetables account for about 90 percent of all processed vegetable tonnage. This year there is further expansion of tomato and pickle cucumber acreage. Under average yield conditions, 3 to 5 percent more vegetables for processing might be expected this coming season. A larger total canned pack is likely for 1975, but freezers may cut back moderately to avoid excessive supplies in 1975/76.

After 2 years of high prices and relatively light market supplies, this year the *potato* industry is working its way out of a serious oversupply situation. April 1 stocks of 73 million cwt were record large for that date. The spring crop production estimate is down a fourth, but prices to eastern growers are expected to be generally weak well into the spring quarter. Western Russet Burbank prices than shown recent strength. Growers intend to plant 5 percent less acreage this summer and fall. The sharpest reductions are in Maine, Minnesota, and Idaho.

Prospective plantings reported in mid-March show that sweetpotato growers expect to plant 1 percent fewer acres in this season. With heavy stocks of canned sweets now on hand, processors are not likely to use as many this coming season.

With generous supplies of dry beans now on hand, growers' intentions are to plant 8 percent less acreage to dry beans this year. The largest cuts are to come in California where limas and blackeye peas are grown, and

in Michigan, the major source of pea beans. These classes are currently in heaviest supply. An 8 percent acreage cut under average yield conditions would still provide more than adequate supplies for the coming season.

RECENT DEVELOPMENTS AND OUTLOOK

FRESH VEGETABLES

Acreage for harvest of 14 spring vegetables is 1 percent larger than the same quarter of 1974. Based on average yields of the past 3 years, potential production would be 3 percent less than last year. Spring melon acreage is down again this year with cantaloup acreage sharply below the early 1970's. Potential combined output of spring cantaloup, honeydews, and watermelons would be moderately less this season, assuming average yields of the past 3 years.

Fresh vegetable shipments to this country from Mexico for the 1974/75 season to April 1 were about a third less than a year earlier. Border crossings of tomatoes, peppers, and cucumbers, the three most important items, were all sharply below a year earlier. Melons from Mexico have been scarcer, too.

Despite a smaller winter acreage, carlot shipments of fresh market vegetables were substantially larger this past winter. This included moderately larger stocks of storage onions and cabbage. Totals of all important vegetables except carrots and celery were larger, with

Florida tomatoes showing the greatest percentage increase. These larger domestic shipments did not quite offset the reduced level of imports from Mexico.

Fresh market vegetable prices received by growers this past winter quarter were sharply higher than a year earlier. The index stood at 177 percent of 1967 compared with 151 a year earlier and 162 in 1973. The record high for any single month occurred in April 1973 when onions were very short. The index peaked at 196 at that time. Prices received by growers are expected to hold steady to slightly higher in the second quarter with some seasonal decline expected during the summer. Potatoes, sweetpotatoes, and dry beans make up a separate group in the index of prices received by growers. They are not included in the fresh market vegetable group.

Retail prices of fresh vegetables, excluding potatoes, rose about a tenth between the last quarter of 1974 and the first quarter this year. This rise is likely to hold through the spring, then decline moderately in seasonal fashion this summer. The yearly average is expected to be moderately more than 1974.

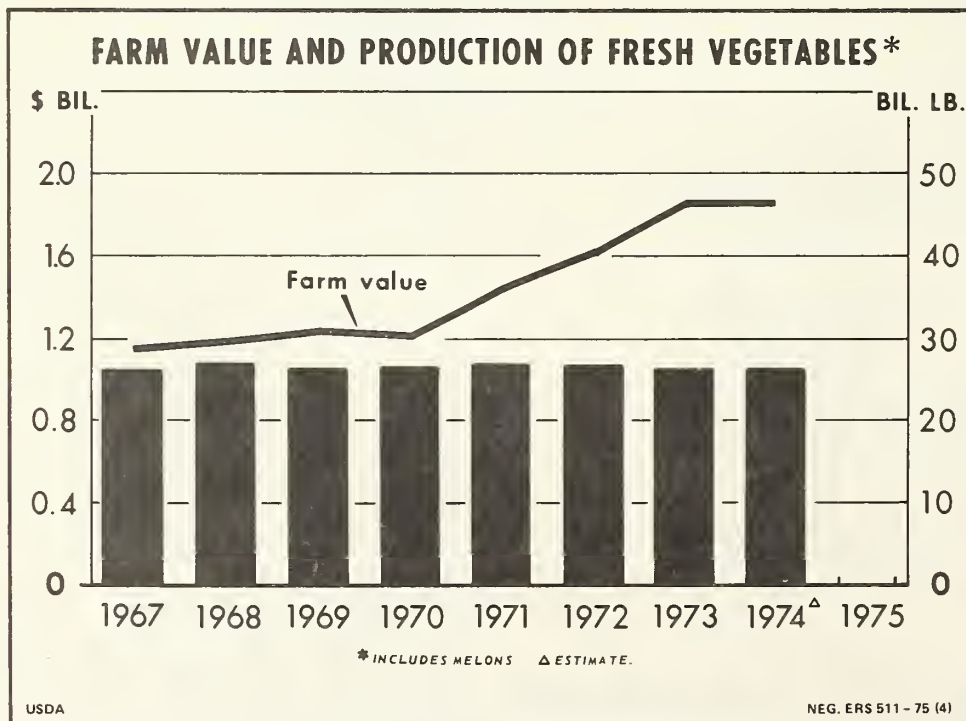


Table 1—Vegetables, fresh: Representative prices (wholesale lots) at New York and Chicago for stock of generally good quality and condition (U.S. No. 1 when available) indicated periods, 1974 and 1975

Market and commodity	State of origin	Unit	Tuesday nearest mid-month					
			1974		1975			
			Mar. 12	Apr. 9	Jan. 14	Feb. 18	Mar. 18	Apr. 8
			Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
New York								
Beans, snap, green	Florida	Bu. hamper and crt.	12.00	5.75	11.00	8.25	7.75	9.75
Beets, bunched	Texas	1-2/5 bu. crt. 2 doz.	5.25	6.25	6.00	7.00	6.75	5.25
Broccoli, bunched	California	14's crt. & ctn.	5.00	7.25	7.00	6.50	5.00	5.75
Cabbage, Domestic								
Round type	Florida	1-3/4 bu. crt.	4.50	3.50	5.00	5.125	4.75	4.00
Carrots:								
Topped, washed	California	48-1 lb. film bag, ctn.	4.75	5.25	8.25	10.00	7.75	8.25
Topped, washed	Texas	48-1 lb. film bag, mesh master	3.00	---	---	---	---	6.25
Cauliflower	California	Ctn. Film wrpd., 12's	6.75	7.75	9.00	8.25	8.50	7.50
Celery:								
Pascal	California	Crt. 2-3 doz.	5.50	5.00	6.75	8.25	7.50	6.00
Pascal	Florida	Crt. 2-4 doz.	4.50	4.50	5.25	6.00	6.00	5.00
Corn, sweet (yellow)	Florida	4 1/2-5 doz. crt.	6.00	5.625	5.00	6.50	7.00	5.50
Cucumbers	Florida	Bu. bskt.	10.50	11.00	---	---	20.00	13.00
Lettuce, Iceburg	California	2 doz. ctn.	5.00	6.00	8.75	5.25	6.25	5.25
Onions:								
Yellow, Globe, medium .	New York	50-lb. sack	4.50	4.25	2.60	3.25	3.85	4.00
Yellow, Granex, large . .	Texas	50-lb. sack	---	3.75	---	---	---	8.75
Peppers, green	Florida	Bu. bskt., large	4.50	6.50	8.50	9.25	9.50	5.75
Spinach, Savoy	Texas	Bu. bskt.	---	---	6.00	6.25	7.00	---
Chicago:								
Beans, snap, green	Florida	Bu. hamper and crt.	13.00	6.37	13.50	8.75	8.50	9.25
Beets, bunched	Texas	Crt., 24's	4.75	4.75	---	5.75	---	---
Broccoli	California	14's crate	5.00	7.00	7.00	7.00	5.50	5.50
Cabbage, Domestic								
Round type	Texas	1-3/4 bu. crt.	4.25	3.50	4.75	4.65	5.25	3.80
Carrots:								
Topped, washed	Texas	48-1 lb. film bag, mesh master	4.15	---	6.90	8.25	7.00	6.50
Cauliflower	California	Ctn. film wrpd. 12's	7.25	7.50	9.75	8.25	8.25	8.25
Celery:								
Pascal	California	crt. 2-3 doz.	6.00	4.87	7.25	7.00	7.25	5.50
Pascal	Florida	crt. 2-4 doz.	5.00	4.50	5.75	5.25	6.00	4.50
Corn, sweet (yellow)	Florida	4-1/2-5 doz. crt.	6.65	5.75	5.25	8.00	7.00	5.00
Lettuce, Iceberg type	Arizona	2 doz. head ctn.	5.25	4.75	8.00	4.75	5.75	5.25
Onions:								
Yellow, Granex, med. . .	Texas	50 lb. sack	---	---	---	---	---	---
Yellow, Globe, medium .	Midwestern	50 lb. sack	4.20	---	2.50	2.40	3.75	---
Peppers, green	Florida	Bu. bskt., large	---	8.50	11.50	11.50	12.50	8.00

Weekly summary of terminal market prices, Market News Report, AMS, USDA.

Prospects for Major Fresh Vegetables

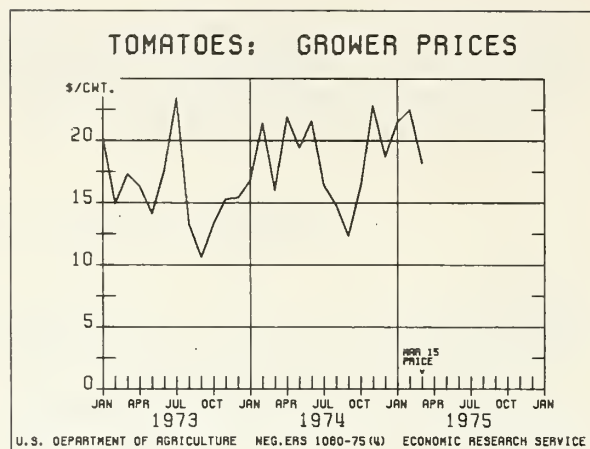
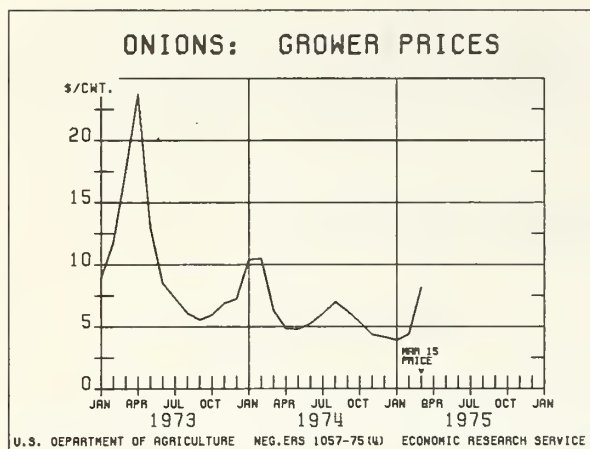
Onions

In the Lower Rio Grande Valley, spring onion harvest gained momentum while supplies of the 1974 stored crop were rapidly depleted. Hot weather in South Texas hastened maturity and, as a result, jumbo sizes of both whites and yellows currently command substantial premiums.

Texas shipments of new crop onions for March were nonetheless 43 percent smaller than a year earlier. Shipments from that State will be seasonally active through May, but production there is estimated at 2,975,000 cwt, 17 percent less than 1974. Mexican

border crossings since the first of the year have lagged a year earlier by about 8 percent. This was at least partly the result of low prices and larger domestic stocks of old crop onions from some northern States. These old crop onions were largely gone by late April.

The lighter crop from Texas is expected to continue to lend strength to prices this spring. Prices for all sizes are now sharply higher than a year ago; they moved up smartly in early March, a time when storage supplies were running down, but before any appreciable new crop volume developed. Mid-april Texas onion prices ranged from \$4.75 to \$7.00 per 50-pound sack compared with \$2.02-\$3.12 a year earlier. Later in April this year, prices advanced even further with large sizes bringing \$12 with a few as high as \$15 per sack.



The prospective summer onion acreage is expected to be 4 percent less this year—81,240 acres. In the summer storage States the figure is 3 percent less. If these plans are carried out and yields are close to average, supplies are not likely to be excessive but markets would be adequately supplied this coming fall and winter.

Tomatoes

Since the beginning of the season last November, Florida shipments of about 11,400 carlot equivalents to early April have been running 21 percent heavier than a year earlier. It appears that Florida will have its most active shipping season since 1967/68. An increased acreage of staked tomatoes in that State, coupled with the lack of cold weather and generally good growing conditions, has provided heavier shipments. At the same time, Mexican supplies have been sharply smaller this year. Border crossings this season (which include supplies moving to Canada) were almost 25 percent less as of April 5. This makes the second consecutive season of declining Mexican supplies. Up to the first of April, total tomato supplies were moderately less than a year earlier. Too much rainy weather last November gave a

poor start of a reduced Mexican acreage. Returns to growers there were not too favorable for part of the previous season.

Since the first of the year, Florida shipping point prices have been sharply above either 1973 or 1974, save for a short period close to February first. Prices for Mexican fruit f.o.b. Nogales, Ariz., have responded in similar fashion. Retail prices (BLS) of 60 and 62 cents a pound in January and February were record highs for these months.

Domestic acreage for spring harvest is 31,200 acres, 1 percent more than a year earlier. Gains are reported from Texas and Florida, but there are small declines in Alabama, California, South Carolina, and a couple of other States. Peak supplies are expected from the Palmento-Ruskin area of Florida during May and early June. In other States, shipments can be expected from late May through to early June. In addition, Mexican imports will be reaching many West and Midwest markets in slowly declining volume throughout the spring quarter. By late June, Mexican shipments will fall to less than 100 cars per week. Peak shipments from Mexico can run 900-1,000 cars per week during February or March.

Table 2—Major sources of U.S. winter tomato supplies¹

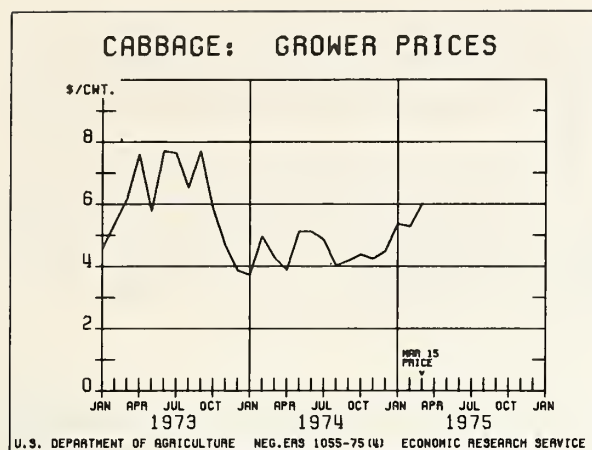
Season October thru mid-April	Florida	Mexico ²	Total Florida and Mexico	Mexico as percent of total
	Thous. carlots	Thous. carlots	Thous. carlots	Percent
1967/68	12.5	8.1	20.6	39
1968/69	9.4	10.5	19.9	53
1969/70	6.0	13.3	19.3	69
1970/71	7.7	11.4	19.1	60
1971/72	10.0	11.9	21.8	54
1972/73	9.1	14.4	23.5	61
1973/74	10.0	11.7	21.7	54
1974/75	11.9	9.3	21.2	44

¹Fruit and Vegetable Division - AMS - USDA. ²Border crossings include shipments to Canada.

Cabbage

Shipments during the winter quarter, largely from Florida, Texas, and California, were slightly larger than a year earlier, although winter acreage for harvest was 13 percent less. Even with increased shipments, grower prices this past quarter were the highest for the quarter since 1970. Grower prices are expected to average at least 6 cents per pound during the spring quarter, well above the low levels which prevailed during much of 1974.

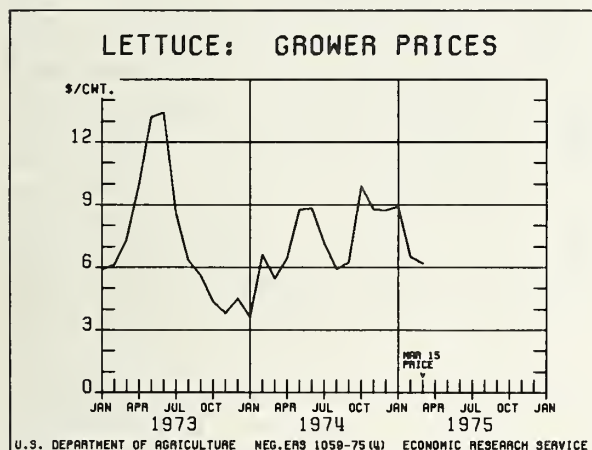
Prospective acreage for spring quarter harvest is 22,630, 3 percent less than a year earlier. If yields turn out to be average, 5 percent less tonnage might be expected than in 1974. Normal supplies are expected in California, with most coming from the South Coast area. There are smaller acreages in both Florida and Texas this



season. A slightly larger North Carolina crop was off to a slow start due to cold, wet weather. The Texas harvest will move out of the Rio Grande Valley during the spring quarter.

Lettuce

First quarter shipments of lettuce from California and Arizona were approximately 30,000 carlots, 4 percent more than the same period of 1974. Prices to growers dropped throughout the period, ranging from 9 cents per pound in January to 6.2 cents in early March. On a crate basis (24 heads) f.o.b. Imperial Valley, the figures ranged from \$5.10 in January down to \$2.00 in late March. Since then prices have shown some strength. By the end of March, the Imperial Valley wound up its season and, by early April, supplies were coming from the Palo Verde District and western and central Arizona shipping points.



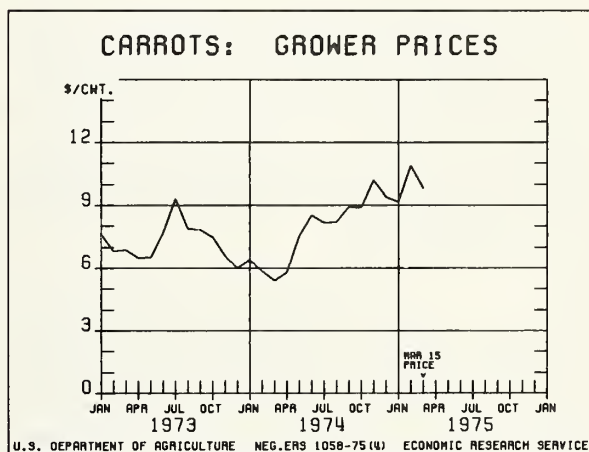
For the spring quarter, a 6 percent larger acreage with average yields would promise larger lettuce supplies than last spring. About 90 percent of the spring quarter output originates in California and Arizona. New Jersey, New Mexico, and Florida account for the bulk of the

remainder. Planting of spring lettuce in California was interrupted several times by rain. Supplies came from several California points during April and early May, and the important Salinas District will have volume harvest by early to mid-May.

Carrots

With shipments during the winter quarter running moderately lighter than a year earlier, carrot prices continued their irregular advance from an early 1974 low. Mid-April f.o.b. prices in California were 11 cents per 1-pound film bag against 7½ cents a year earlier. Growers have been harvesting from a 19 percent smaller winter acreage. Harvest has been steady since January in Arizona, with peak volume expected there this spring. Carrots have been moving from the Imperial and Coachella Valleys of California, and harvest activity there will continue active through May and end in June. Kern County, Calif., will also have May carrots as well as South Texas.

With total spring acreage off 9 percent, current price levels generally are expected to be well-maintained or rise somewhat. Smaller acreages in Arizona and Texas are offsetting a substantially larger crop in California.



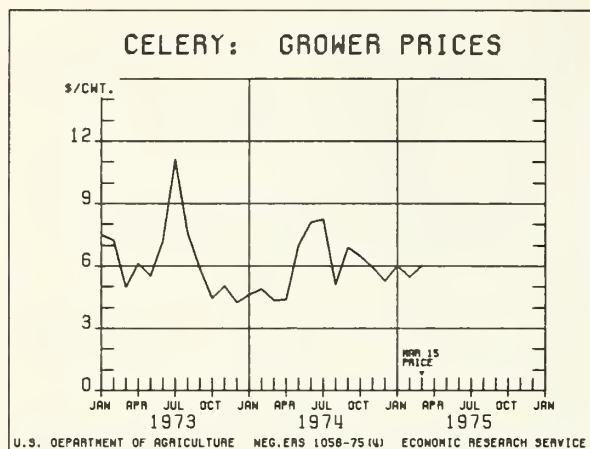
Celery

Although winter celery acreage was 8 percent less, total shipments from California and Florida this past winter were only slightly smaller than a year earlier. Prices to growers have been substantially higher than the lows of a year earlier. Mid-April prices of \$2.95-\$3.25 per crate compared with \$2.40-\$2.50 a year earlier.

Prospective acreage for harvest during the spring quarter is estimated at 9,100 acres, less than a percentage point more than the harvest last year. This would suggest slightly heavier supplies and generally steady prices. A special SRS report noted 9,670 acres were growing in Florida and California on April 1, down 6 percent from last year.

The California spring crop will come primarily from the Oxnard area with some additional volume from

Orange County. The Central Coast area will begin in May, but peak volume there will be reached next October and November. Florida harvested steady volume through April but a seasonal decline begins in May with harvest ending in June.



Sweet Corn

A 1 percent boost in spring sweet corn plantings to 34,100 acres would suggest 4 percent less output than last year if average yields prevail. The important Florida acreage, largely in the Everglades and Zellwood, will provide peak harvests in May. Florida acreage is three-fourths the U.S. spring total. Progress of California plantings was delayed by cool, wet weather. The Desert area has supplies during May, and shipments from Kern County will begin in June.

Asparagus

Prospective acreage for harvest this year has moved down to 103,580 acres, 8 percent less than a year ago. In the past 3 years California acreage has declined markedly while Michigan has increased further with Washington holding steady. These three States account for three-fourths of the U.S. total. Illinois and New Jersey have been cutting back from a smaller acreage base. March shipments of fresh market asparagus from California have lagged a fourth behind a year earlier. Nonetheless, grower prices the first of March were reported 33.8 cents per pound, compared with 42.2 cents a year earlier, reflecting some weakened demand for a crop many consider a luxury food. Nonetheless, fresh market shipping point prices have been running close to a year earlier as of mid-April.

Cantaloups

A 7 percent smaller acreage is forecast for spring melons this year. Spring acreage is sharply below comparable figures of the early 1970's. More attractive crop alternatives and labor-management episodes are the primary reasons for this lack of interest. The largest

cantaloup plantings are made for summer markets, with California dominant. May harvest will begin about on schedule in Texas, Arizona, and California. Production would be 12 percent less this season under average yield conditions.

Cantaloup imports, reported as truck shipments to the end of March, were 1 percent less than the relatively large figure recorded a year earlier. Mid-April wholesale prices for Mexican cantaloups were exceptionally high—19 cents a pound, f.o.b. South Texas points.

Watermelons

Spring watermelon acreage is up 1 percent this season and average yields would imply 5 percent less output for spring 1975. Light supplies were available from southwestern Florida during early April. First picking began in west central parts of that State in late April. Volume will come during May. Texas planting activity was completed by early April in the southern producing areas. These two States account for nearly 90 percent of the U.S. spring acreage this year. Georgia, Alabama, and California each have an additional 3000-3800 acres. The largest watermelon plantings in these States are grown for summer harvest.

Imports from Mexico (reported as border crossings) were about 20 percent smaller this season. These imports decline as domestic supplies increase.

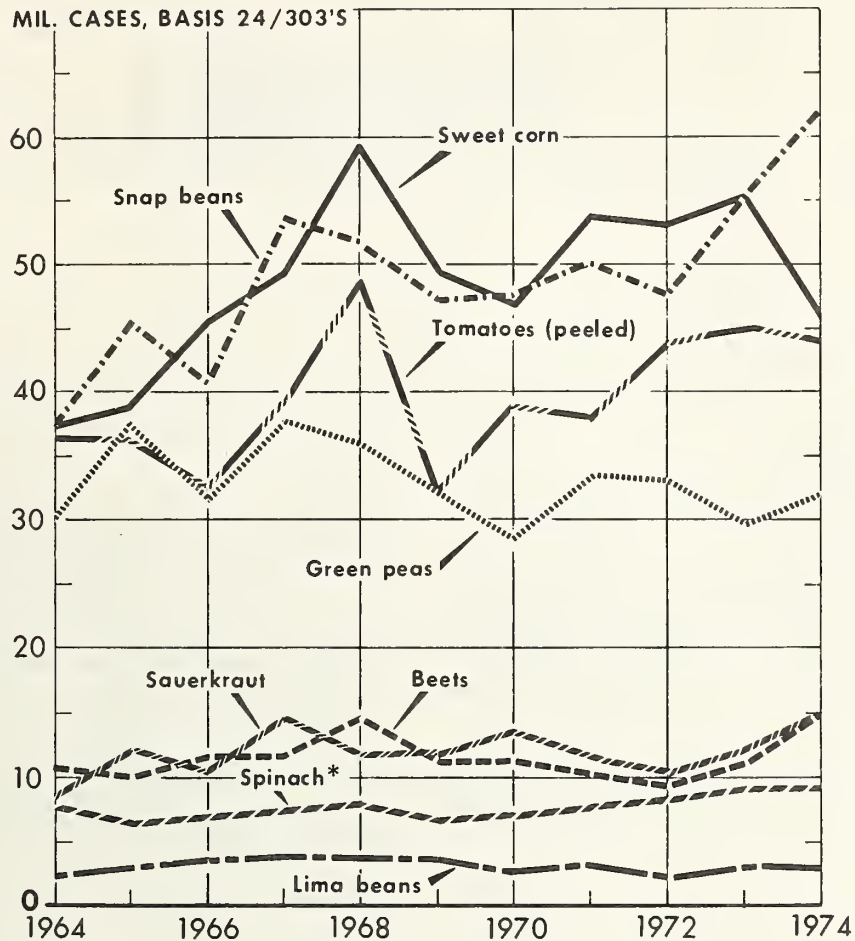
PROCESSED VEGETABLES

Processed vegetable supplies have been ample this season. The combination of increased packs and some reduction in demand has eased the tight supply position which prevailed much of 1973/74.

The current marketing season began with sharply advanced wholesale prices, reflecting rapidly rising processor costs during 1974. Early last fall, movement of canned vegetables held up well as the trade rebuilt depleted supplies. But after Thanksgiving, movement slowed markedly, and after the first of the year, numerous price concessions appeared. These price cuts have generally been in the range of 35-75 cents per case. But after earlier advances of \$1.25-\$1.75 per case for many items, wholesale prices still seemed high to many customers. January and February movement was very disappointing for many packers. The industry hopes for better movement the balance of this season without making further price concessions. With more generous stocks now on hand, canners and freezers do figure on a larger carryover for several items. But view of some further cost increases for 1975 packs, a moderately larger carryover would not be a serious problem for them nor would it be too costly from their standpoint. Moreover, carryovers the past two seasons have been unusually small for the most part. The carryover of canned corn and canned tomatoes will be small this time, and will provide two conspicuous exceptions to the general picture.

SELECTED CANNED VEGETABLE PACKS

MIL. CASES, BASIS 24/303'S



* 1974 PACKS USDA ESTIMATE.

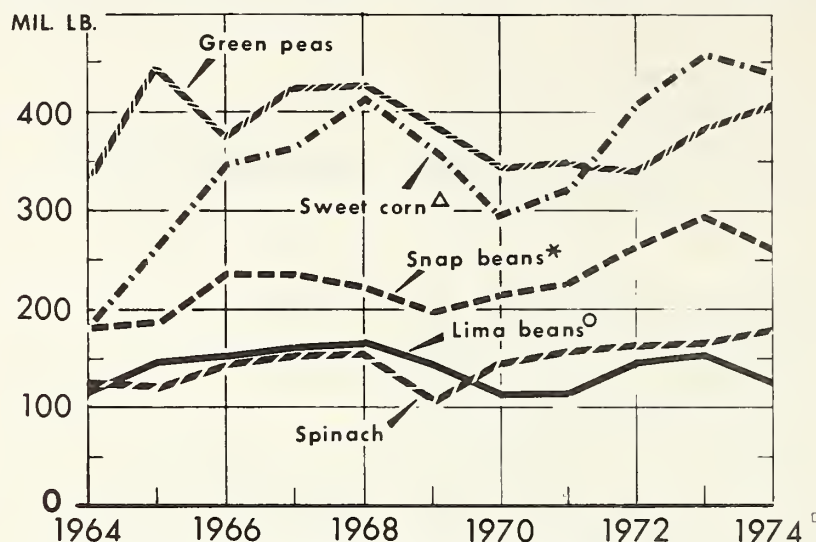
SOURCE: NATIONAL CANNERS ASSOCIATION.

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AGRICULTURAL MARKETING SERVICE

SELECTED FROZEN VEGETABLES ANNUAL PACKS



△ CUT CORN AND CORN-ON-COB. ○ INCLUDES EMERALD LIMA BEANS, EXCEPT IN 1971.
 * INCLUDES ITALIAN GREEN BEANS AND WAX BEANS. SOURCE: AMERICAN FROZEN FOOD INSTITUTE
 □ 1974 PACKS FOR SNAP BEANS, LIMA BEANS, AND SPINACH PARTIALLY ESTIMATED.

U.S. DEPARTMENT OF AGRICULTURE

NEG. AMS 519 - 75 (4)

AGRICULTURAL MARKETING SERVICE

Slightly More Acreage Under Contract This Year

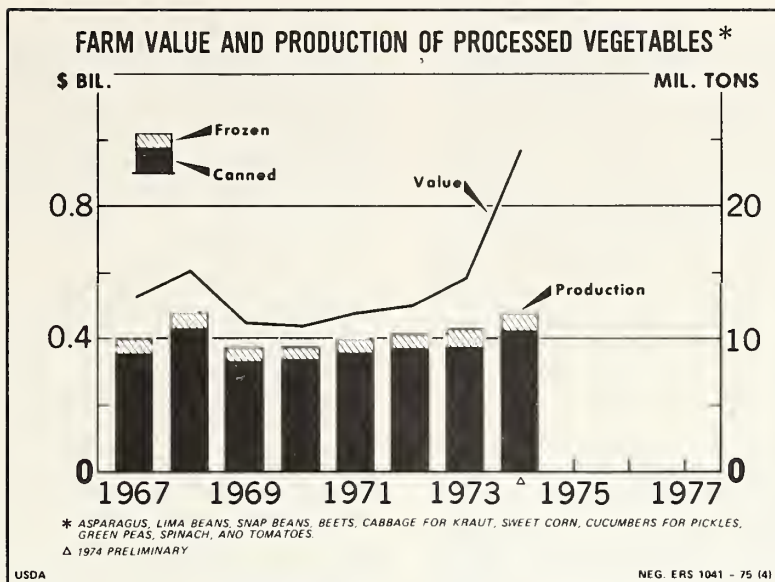
In response to a generally adequate supply picture, processors handling 8 major vegetable crops expect to contract for 3 percent more vegetable acreage in 1975. These vegetables account for about 90 percent of all processed vegetable tonnage. This year there is further

expansion of tomato and pickle cucumber acreage. Considering other leading vegetables (canning and freezing combined), changes are slight—1 percent fewer snap beans, no change in sweet corn, 1 percent more limas, and 3 percent more peas. Cabbage tonnage under contract to kraut packers is 6 percent less, and cannery beet acreage is up 1 percent.

Table 3—Vegetables for commercial processing: Prospective plantings

Crop	Planted acreage			1975 as percentage of	
	1973	1974	Prospective ¹ 1975	1973	1974
	1,000 acres	1,000 acres	1,000 acres	Percent	Percent
Beans, green lima:					
Freezing	53.4	52.1	52.2	98	100
Canning	29.3	27.6	28.0	96	101
Beans, snap:					
Freezing	77.9	66.6	60.0	77	90
Canning	231.9	253.5	242.5	105	96
Beets for canning	17.9	20.2	19.9	111	99
Corn, sweet:					
Freezing	134.1	131.9	127.1	95	96
Canning	355.3	380.4	382.9	108	101
Cucumbers for pickles, spring and summer	128.4	137.4	135.5	106	99
Peas, green:					
Freezing	158.8	165.0	161.5	102	98
Canning	276.3	297.5	313.3	113	105
Spinach, winter:					
Freezing	7.0	7.0	6.2	89	89
Canning	4.8	4.8	3.1	65	65
Tomatoes	305.9	343.7	368.2	120	107
Total 8 crops	1,781.0	1,887.7	1,900.4	107	101

¹ Under contract.



Anticipating 1975/76 Supply and Price Prospects

With average yields, 3 to 5 percent more tonnage might be expected this coming season. Tomato yields were not especially heavy in either 1973 or 1974. There is a good chance that 1975 tonnage would be higher than the acreage data by themselves would suggest. Acreage intentions and other indications suggest a larger total canned vegetable pack in 1975 but freezers will probably cut back moderately to avoid excessive supplies in 1975/76.

Adequate supplies of all major items can be expected if weather holds close to normal in the major producing areas. Even so, there are times when the industry can counteract the effects of unfavorable weather. Often, shortages in a single item are compensated by heavy supplies of a good substitute. For example, last year an untimely freeze curtailed the canned sweet corn pack in Minnesota and other Midwest States. The short corn supply was more than balanced by a large canned snap bean pack. Another example would include the heavy off-season vegetable packing which took place in California in early 1974 when supplies of several major items were short. Relatively large packs of broccoli, cauliflower, spinach, and carrots helped fill a short supply situation at that time.

With larger supplies, and with a lessening of cost increases, processed vegetable prices this fall are likely to be only slightly higher than the fourth quarter of 1974. Raw product costs to processors are likely to be the same or less than they were in 1974, but other items such as labor and utilities are expected to cost more this season. Should yields and subsequent packs turn out to be generally above average, then a strong promotional effort and reduced prices would be required. In marked contrast to a year earlier, container supplies, including tinplate, are adequate, and in some instances, prices have been shaved for off-season packers.

Prospects for Leading Processing Vegetables

Lima Beans

With comparatively short supplies currently on hand, canners are in a relatively strong position. Even if movement falters the rest of the season, the August carryover will be one of the smallest in recent years. List prices in March were roughly \$2.00 per case higher than a year earlier. Growers intend to increase 1975 acreage by 2 percent to 28,000 acres. A gain in acreage of this size, with yields on a par with 1972 or 1973, would result in adequate but not excessive packs this season.

Although freezers expect a larger total carryover into 1975/76, this probably would not lead to excessive supplies if packers and growers carry out their present plans to maintain acreage equal to 1974.

Snap Beans

March 1 stocks of canned snap beans exceeding 26 million cases (basis 24/303's), a record for that date since 1969. Even if movement picks up substantially, a large carryover is in prospect. With the heavy supply, wholesale prices are off moderately since the first of the year, accenting the recent weakness of processed vegetable prices. It would take a substantial further price reduction to move enough more to prevent a large carryover. At this writing, the industry does seem willing to cope with larger stocks. April wholesale prices were sharply higher than a year earlier—Midwest Fancy cut \$5.45 versus \$4.20 per case (24/303's). Furthermore, acreage to be contracted for canning is the same as a year earlier. Clearly, canners seem to be betting that the popularity of this vegetable will see them through.

Stocks of frozen snap beans were 15 percent greater than a year earlier on April 1. Prices for consumer and bulk packs have been holding fairly steady at high levels

with institutional packs at 35 cents a pound and 24/9 ounce packages at \$5.50 for both cut and french styles. Here, too, the industry is headed for a generous carryover, but present acreage intentions call for a cutback of 5 percent for 1975.

If processors actually follow the plans as reported in late March, then canned snap bean supplies would again be heavy this coming season. In 1974, a larger than usual acreage abandonment took place and if yields should hold close to 2.5 tons per acre, 575,000 tons would again be available for canning. Such a large tonnage canned would probably result in distress prices this fall.

Green Peas

Canners' stocks of peas on March 1 were 10.5 million cases (24/303's), sharply above the limited supply on hand a year earlier but 9 percent less than 2 years earlier. Shipments thus far this season have lagged the two previous marketing periods. What started out as a tight supply picture has now turned to more than ample. Trade sources report that prices are barely steady and occasional deals have been reported. Movement will have to pick up to avoid an excessive carryover late this spring.

At this same time, stocks of frozen peas are the largest since 1971, though not excessive when compared with any but the last two seasons. Nonetheless, movement thus far this marketing season is about a tenth less and prices for consumer packs have been shaved 25 cents per case.

The industry may be figuring that recent lagging movement may be only a temporary phenomenon because it plans to raise 5 percent more acreage for canning in 1975 and 2 percent less for freezing. However, if movement continues to be slack, these intentions may be reduced by the time late seedings are to be made. The way it appears now, a pack of canned peas the same size as 1974 would be about all that could be handled without difficulty for the processor. The 2 percent cut in freezing acreage would seem to be close to market needs for 1975/76, assuming average yields.

Sweet Corn

Stocks of canned corn on March 1 were only 8 percent less than a year earlier. The small 1974 pack left a supply that was actually less than trade movement the previous two seasons. But generous supplies of snap beans and adequate supplies of other vegetables, plus the disappointing trade movement of processed items in general, thus far in calendar 1975 have all but overcome the potential severe shortage. Prices of canned corn are still sharply higher than last year. For example, April Midwest Whole kernel golden fancy was quoted at \$6.75 per case (24/303's) against \$4.50 in April 1974. The first hint of trading allowances appeared this month (April) for Northwest packs, but Midwestern canners are the ones with shortest supplies.

For 1975, canners intend to contract for less than 1 percent more acreage than last year. This would be expected to provide an adequate supply of raw tonnage, assuming a difference of about 27,000 acres abandoned or otherwise not harvested (proportional to 1972 and 1973 experiences). A yield of 4.5 tons per acre, U.S. average, would result in 1.6 million tons for canning, 15 percent more than abbreviated 1974 tonnage and 7 percent more than 1973.

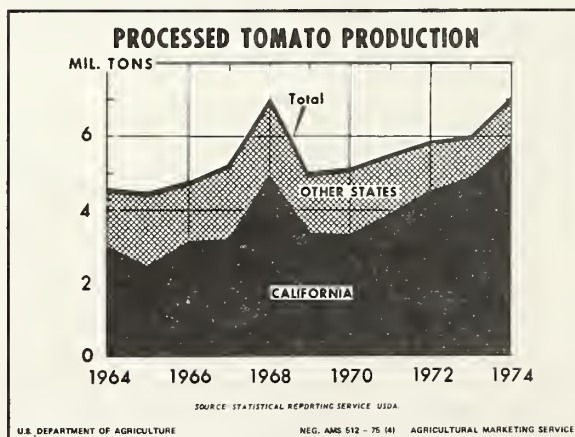
April 1 stocks of frozen sweet corn were the largest since 1970 and were 8 percent more than a year earlier. With canned stocks on the short side, this supply is not excessive. Prices at wholesale have held firm for institutional packs but consumer sizes have been reduced 25 cents per case to \$4.75 in recent weeks. A trade source noted thin supplies remaining in the Pacific Northwest. Freezers expect to contract 3 percent less acreage this coming season. Under average conditions, this would still provide adequate supplies for the coming market season.

An early contract price in the Midwest offering \$49.50 per ton for yellow and \$50.50 for white is about a \$2 per ton increase over 1974. An Idaho price is the same, but a payment for bypassed acreage is worth more this year.

Tomatoes

With stocks of canned tomatoes the smallest in 7 years, wholesale prices for this item have been firm to strong all season, contrary to the tone of most of the canned vegetable market. The supply of canned tomatoes was limited by both a reduced pack and a smaller carryover in the 1974/75 period. The large 1974 raw product tonnage moved largely to the concentrated items—paste, sauce, and catsup. A larger juice pack was also reported for 1974. Prices for tomato products other than canned have been generally steady with some trading off list prices recently reported.

The stronger market position of the processed tomato industry is reflected in the planting plans for 1975. The prospective contract acreage for tomatoes is 368,180 acres, up 11 percent from 1974. California



intentions totaled 285,000, a 15-percent gain over the 248,700 contracted last year. The California share of the U.S. total acreage is 77 percent. Elsewhere, Indiana, Maryland, Pennsylvania, and Texas plan to increase acreage, while Michigan, New Jersey, and Ohio—among the better known tomato packing States—expect to raise less.

Tomatoes for Processing

Year	Acreage	Production
	<i>Planted</i>	<i>Million tons</i>
1972	272,510	5.8
1973	305,940	5.9
1974	343,690	7.0
1975 Proj.	368,180	7.4-7.7

At this writing, California canners and packers have not settled on a contract price. Processors have offered \$55/ton but growers are holding for \$57.50 bulk and \$59/ton in bins, fairly close to the range of last year. Substantial acreage had been planted by the end of March in that State, but wet weather may have created a need for some replanting. One Ohio contract calls for a range of \$56 to \$71/ton compared with \$41-\$65 in 1974, according to quality. A Pennsylvania firm has signed grower contracts at \$71 per ton for the coming season.

Cucumbers for Pickles

Tonnage of cucumbers going for pickles was reported 1 percent less in 1974 but with a larger carryover, the total pickle supply was estimated less than 1 percentage point more than a year earlier. A leading trade association reported January 1 stocks 7 percent less than 1974 in their sample estimate. This suggests good trade movement.

Acreage to be under contract for pickles this coming season is up 12 percent to 135,470 acres, the sharpest expected acreage increase for any processing vegetable. All the leading States expect to plant more except Ohio and Mississippi. The States having the largest acreage under contract are North Carolina with 28,000 acres, up 6 percent, and Michigan, up 8 percent to 27,800. Wisconsin is a distant third with 11,100—up 6 percent. The biggest percentage gains are in Texas, California, Indiana, Maryland, and Virginia. Unlike tomatoes and some other processing vegetable crops where production is concentrated, the cucumber pickle is a cosmopolitan character, grown in all sections of the United States.

Sauerkraut

Kraut stocks, while larger than either of the three previous seasons, are not burdensome. As of April 1, the 5.1 million cases on hand compared with 3.4, 3.6, and 4.7 million the previous three pack seasons. Nonetheless,

packers intend to contract for 232,550 tons of cabbage this season, down 6 percent from last year. In addition, should supplies still turn out to be too heavy, open market purchases of cabbage late this summer could be curtailed. In view of the relatively large supply of sauerkraut now on hand, it is likely that open market purchases would fall nearer the 1972 and 1973 levels of 21,000 tons, rather than the 34,000 tons purchased in 1974.

Beets

Stocks of beets in canners' hands are the largest since the spring of 1971. Here, too, the supply is not considered burdensome. Since the first of the year, prices have moved narrowly both ways, depending on the style of pack and the section of the country. Nonetheless, the carryover into 1975/76 will be relatively large—equal to about 40 percent of the annual disappearance. This year processors expect to contract for 1 percent more acreage, a total of 19,860. Total planted acreage last year was slightly more than this figure, indicating a very small amount of open market purchasing in 1974. With little change in acreage expected this season, and with 13-ton-per-acre yields from this relatively large 1975 acreage, the total supply of canned beets would be more than ample this fall.

Carrots

Stocks of frozen carrots on April 1 were 131 million pounds, the highest of record, 22 percent more than a year earlier and double the quantity 2 years ago. Interest in this item grew during the time when other vegetables were in short supply. Larger quantities were packed the past two seasons, and movement has yet to catch up. Wholesale prices barely changed during 1974, as institutional slices ranged from 16½ to 17 cents per pound at a time when peas, beans, and corn advanced by as much as 50 percent. At the moment, canned stocks are also heavy. There are no acreage plans reported for processing carrots, but a sharp cutback in 1975 processing tonnage is all but certain.

Spinach

With heavy carryovers of both canned and frozen spinach, contracting for the winter crop in 1975 was off 21 percent. The carryover of canned spinach was 4.1 million cases, the largest of recent record. Stocks of frozen spinach, 47.2 million pounds on March 1 (the carryover month), a record for the month. As with carrots, spinach prices advanced only slightly during 1974 under the pressure of heavier supplies. Since the first of the year, West Coast wholesale prices have slumped to \$2.20-\$2.40 per case, the lowest since 1971.

With large supplies on hand, it is likely that spring packing activity will be less this year, too. Estimates will be available in late June.

Broccoli

Tonnage used for freezing was almost 115 million pounds last year. Supplies are currently record large, but the pattern of increased annual usage suggests this crop may not be in too serious a stocks position. In all likelihood, the 1975 California spring pack will be smaller, and total tonnage frozen in 1975 may be off at least moderately.

Asparagus

Canned asparagus stocks at the start of the season March 1, 1975 for the U.S. were more than twice as large as a year earlier. Movement of the 1974 crop was down sharply. The total available supply was moderately smaller. Frozen stocks are less than the relatively large quantity on hand early in 1974, but not low enough to encourage a big increase in 1975 processing activity. Furthermore, acreage available for fresh and processing uses combined is 8 percent less this year.

POTATOES

Among potato growers who did not contract for a substantial portion of their 1974 crop in advance there have been clear signs of distress and uncertainty this spring. The most acute problems are centered in Maine, but low cash market prices from mid-December through early April have adversely affected every fall crop region. U.S. prices averaged \$3.16 per cwt in March. Just 1 year earlier, the price nationwide was \$7.08 and climbing. But grower prices have stabilized or trended slightly higher in early spring 1975. Spring and summer potato production could together total 10 million cwt *less* than 1974. Although storage stocks are 17 million cwt above last year, the basic potato supply situation has moved closer to a balance, since some of the 7 million cwt "excess" supply will probably disappear through cullage and loss.

State Situations

In March, a few States with sales heavily weighted by seedstock, prices showed higher-than-expected grower prices. North Dakota operators, for example, achieved an average price of \$3.80 per cwt and Montana reported \$5.00 per cwt. In a normal season, crop withdrawals for seed use are a key influence on February and March prices. Last season, many of these sales were made in December 1973 and January 1974. That tended to reduce further the already short storage stocks at that time. This year, seed purchases appear to have taken place at more usual times. April 1, 1975, stocks on hand support this observation. A reduction of 7.3 million cwt *more* potatoes occurred in the February 1-April 1 period of 1975 than was the case in the 1973/74 storage season.

In Idaho, a 100 pound sack of US no. 1 Russets (2" or 40oz minimum), was being shipped for \$8.00 in mid-April from the Twin Falls area, up from a \$4.50

mid-March price. Where potatoes could be found there in 1974, early spring shipments had ranged from \$11.45-\$14.75 per sack.

Maine cash markets during 1974/75 have proven extremely weak. Although fall 1974 prices averaged only 50 percent lower than the corresponding period of 1973, the Presque Isle marketplace four months later was shipping at grower prices 85 percent lower than 1974. Moderate price improvement came in early and mid-April. This experience will likely call forth moderately lower acreage in Aroostook County, Maine, though perhaps not as much as the 10 percent cutback suggested in the SRS "Prospective Plantings" report.

Long Island prices for 50-pound sacks of round white potatoes, not influenced by higher-valued deliveries to processors this year, have given another clear picture of the pressure on growers. The low point so far in 1975 was the end of March: \$1.40; \$5.40 was the year-earlier price. And the Suffolk County situation has not been markedly better throughout the entire season.

Michigan farmers faced a marketing environment not too different from Long Island. Smaller needs for snack foods were not entirely offset by recession-induced demand for basic commodities such as tablestock potatoes. So the 50-pound sack there, quoted at \$1.90 at last fall's opening, was down to \$1.60 by April 1, 1975.

Record Storage Overhang

On April 1, stocks of fall potatoes held by growers, processors, and local dealers were 72.7 million cwt. The increase of 16.8 million cwt from 1974 was 30 percent. Potatoes piled up in this quantity because the crop itself was bigger, the expectation—until late March 1975—that cash prices would go lower, and slower-than-expected use of raw product for snack foods and convenience retailing (french fries).

Throughout the 1974/75 season, stocks have been relatively highest in the Eastern States. Maine, the most obvious case, had 13.0 million cwt on hand April 1, up 40 percent from last year. But the problem of marketing potatoes extended to the Red River Valley and Pacific Northwest districts as well. Minnesota and North Dakota combined had 8.0 million cwt in sheds, 45 percent ahead of 1974.

In Idaho, storage stocks through the early months of this year have averaged 15 percent above the tight supply totals of 1974. All food sales of potatoes in that State have been hard hit, with lowered processing offtake an important factor. Growers are usually reluctant to sell crop into residual uses such as feed, but this feed use is up in the first half of 1975 compared to a year ago.

1975 Contracts

In early spring, growers and processors had not yet reached agreement on the prices of potatoes for forward delivery to processors. Last year, Idaho firms in

particular did not wish to take chances with their raw product requirements. This year, with abundant processed and fresh potato food throughout that State and the United States, the industry is not enthusiastic about a base price as high as \$4.00 per cwt. And the parties are equally unsettled about what acreage, if any, will be placed under contract in many key counties. Unlike spring 1974, when a high reference value on contracted acreage prompted abnormally larger plantings than the early intentions report suggested, the absence of potato processing contracts could persuade operations to stick closer to the March 1975 intentions survey.

Potato futures activity

Winter 1975 trading prices of nearby futures contracts deteriorated right along with the plummeting of Maine's cash market potatoes during the 1975 winter trading. Spring quotes of \$3.00-\$3.25 for May and \$4.25-\$4.50 for November deliveries have moved sideways to lower from early winter 1975. Then, those respective deliveries were priced around \$3.95-\$4.30 for May and \$4.40-\$4.50 for November. However, with spring output forecasts in hand, traders in mid-April bid May deliveries to \$4.50 (cwt basis).

Spring prospects

Just 80,800 acres of potatoes are planted for spring harvest this year, a record low. Marketings this spring face price competition from the big remaining fall crop stocks, although perceived quality differences could make up for general weakness in the chip use of spring crop. With a substantially lower average yield than last year in most States, crop production is forecast down 25 percent from 1974. No major State is forecast to have more potatoes, and California in particular expects 3.9 million cwt less. Lower spring production is essential for timely marketing of remaining fall crop potatoes now in storage. Even so, fall 1974 potatoes are probably going to be carried across into June and July.

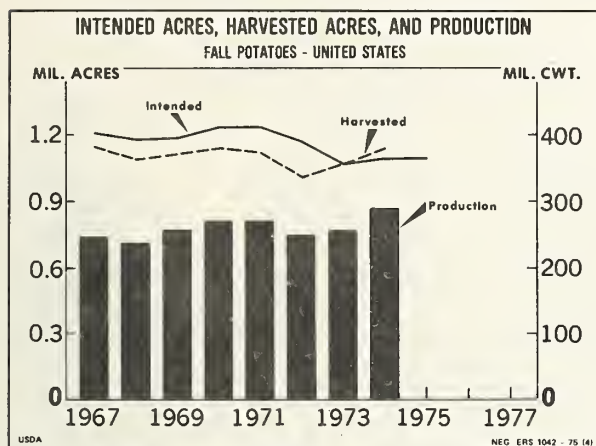


Table 4—Potatoes, fall: Prospective plantings

Crop and area	Acreage planted			1975 as percentage of 1974
	1973	1974	Prospective 1975 ¹	
	1,000 acres	1,000 acres	1,000 acres	Percent
Fall:				
Maine	138.0	142.0	128.0	90
New York-Long Island	25.0	27.0	23.5	87
New York-Upstate	29.0	28.4	27.0	95
Pennsylvania	31.0	33.0	32.0	97
Other States ²	12.8	12.7	11.3	89
Eastern	235.8	243.1	221.8	91
Michigan	33.0	35.0	32.0	91
Wisconsin	48.5	53.0	50.0	94
Minnesota	86.0	90.0	81.6	91
North Dakota	133.0	139.0	132.0	95
Other States ³	25.7	26.6	25.4	95
Central	326.2	343.6	321.0	93
Idaho	325.0	340.0	321.0	94
Colorado	31.0	34.5	33.5	97
Washington	84.0	100.0	95.0	95
Oregon	44.0	50.7	58.0	114
California	20.5	20.4	20.0	98
Other States ⁴	18.5	28.9	28.1	97
Western	523.0	574.5	555.6	97
Total fall	1,085.0	1,161.2	1,098.4	95

¹ Intended acreage as of March 1. ² New Hampshire, Vermont, Massachusetts, Rhode Island, and Connecticut. ³ Ohio, Indiana,

South Dakota, and Nebraska. ⁴ Montana, Wyoming, Utah, and Nevada.

1975 Prospects

Land intended for fall crop potatoes amounts to 1.1 million acres, according to the March 19 "Prospective Plantings" report. This is 5 percent less than acreage planted that season of 1974. Sharpest reductions are in store for Maine, Minnesota, Idaho, and Long Island; Oregon outside Malheur County is the only major area showing an upswing.

Based on 5-year averages of yields for each State in summer and fall production, the size of the crops (given March 1 planting intentions) would be 21.½ million cwt and 270 million cwt respectively. With the known winter and spring U.S. production, the prospect is for 1975 production to total 313 million cwt. This figure would be off over 7 percent from calendar year 1974. Industry sources, both growers and marketing firms, suggest this size annual production is about right to satisfy all end uses-without either shortages or unreasonable inventories.

In the winter 1975 Economic Research Service release, "Potato Facts," a statistical analysis of fourth quarter (Oct.-Dec.) SRS average potato prices was made based on stocks, production, and year-trend. Using the same analysis would yield a point estimate of \$3.17 for the fourth quarter SRS average price in 1975 based on 265 million cwt. (An adjustment from the 270 million cwt mentioned above was made to allow for acreage planted but not harvested)

The SRS price is calculated from sales for all uses, weighted monthly by sales in individual States.

To determine whether this level can be properly inferred from known data on potato supplies and prices, additional analysis of grower revenues was developed. Based on March acreage intentions, beginning stocks on hand, and year-trend, an estimate of fall crop grower revenues (September through the following April inclusive) shows 1975/76 about 5-10 percent above estimated potato crop sales value in 1974/75.

However, an individual grower might try to increase his total revenues during 1975/76 by increasing his acreage. Too much of this would hurt grower interests. The analysis also indicates that for each 1 percent addition to the March 1 intentions, grower revenues September through April would fall by 2-3 percent. Thus, any great increase above 1.1 million acres would push revenues below the 1974/75 figure. The prospect would currently be for slightly more potato acreage than the March 1 report shows, but not so much more that farm operators recognize less total revenue than in 1974/75.

Frozen Potato Products

In mid-April, the Northwest Food Processors' Association reported Idaho frozen potato product truck shipment activity for fourth quarter 1974 10 percent less than the year before. Rail shipments were up 22 percent. But then in first quarter 1975, stationary use by fast food outlets coupled with a wait-and-see attitude

among distributors created a buildup in manufacturers' holdings. Export volume, despite attractive prices, was negligible. Throughout the 1974/75 season, cold storage reports have been confirming the reduced volume, with inventories of frozen french fried potatoes at 691 million lbs on April 1, 76 million pounds higher than a year earlier. Other frozen potato products are similarly in generous supply, with 127 million pounds in cold storage representing an 8 percent advance year-to-year.

For the calendar year 1974, the American Frozen Food Institute reported a frozen potato pack of 3.0 billion pounds, up about 11 percent from 1973. There were no revisions in 1973 pack totals.

Table 5—Pack of frozen potato products*

Year	Million pounds	Year	Million pounds
1960	551	1968	1,736
1961	579	1969	2,048
1962	762	1970	2,404
1963	862	1971	2,565
1964	1,118	1972	2,594
1965	1,219	1973	2,691
1966	1,460	1974	2,985
1967	1,491		

*American Frozen Food Institute.

Canadian Situation

Prices for Canadian potatoes have also been depressed this past winter, with the eastern provinces perhaps hardest hit. As a result, substantial acreage cuts are expected especially in New Brunswick and Prince Edward Island. In areas where processing is an important factor, demand has been weak, too.

In Canada the provincial governments assume a more active role in potato industry programs than in the U.S. In some provinces, there are potato commissions established to handle advertising, research, and promotional activities. But, the Potato Marketing Boards are allowed to set prices, establish pool prices, proclaim marketing quotas, and can negotiate contracts with processors. According to a recent announcement the Canadian government currently supports grower prices at \$2.77 per cwt.

1974 World Crop Declines

Due to unfavorable weather, the 1974 world potato crop declined 10 percent from the previous year's record high to total 234 million MT (5.2 billion cwt). The crop, in many areas throughout Europe and particularly Eastern Europe, suffered dry weather during the summer growing period and heavy rains during harvest. Waterlogged fields prevented the use of any mechanical harvesting equipment in many local areas. As a result, some fields were either abandoned or partially harvested, while others were harvested too late in the season to permit a high quality crop.

Most of the decline in the world's total production is directly related to short crop in the Soviet Union. The Soviet Union is the world's largest potato producer, accounting for 42 percent of the world's crop in 1973 and 35 percent in 1974. This year, however, only 81 million MT (1.8 billion cwt) were harvested, representing a decline of 25 percent from the 1973 record level.

Table 6—Potatoes: Annual production in 10 leading countries and 4 continents for 1972, 1973, and 1974

Country and continent ¹	1972	1973	1974
	<i>Million cwt.</i>	<i>Million cwt.</i>	<i>Million cwt.</i>
U.S.S.R.	1,726.9	2,385.4	1,778.8
Poland	1,074.4	1,144.2	1,038.4
West Germany	331.5	301.5	320.7
United States	296.0	299.4	340.1
East Germany	267.6	255.7	297.6
France ²	186.8	163.1	165.3
United Kingdom ...	143.9	148.0	143.9
Netherlands	123.0	127.2	123.3
Spain	116.3	123.6	119.1
Czechoslovakia	111.5	110.6	101.4
Total 10 countries	4,377.9	5,058.7	4,428.6
Europe ³	4,563.7	5,228.2	4,582.7
North America	350.0	356.9	403.6
South America	86.0	84.3	102.8
Asia	77.9	75.2	64.4
Total 4 continents	5,077.6	5,744.6	5,153.5

¹ Continent totals are for specific countries where statistics are available. ² Excludes home gardens. ³ Includes U.S.S.R.

Foreign Agricultural Service

Although many countries in Western Europe also had to contend with heavy autumn rains, the total crop increased slightly over the previous year's level, primarily because of an early West German harvest. Fortunately, the bulk of the French and German crop had been lifted prior to the onset of the rains and thus suffered only a minimal decline in quality. Along with North America, South America also had heavier 1974 production.

The United States has developed only a limited foreign trade in potatoes with small quantities moving both ways across the Canadian border, mostly between Maine, New Brunswick, and Prince Edward Island. However, processors in the Pacific Northwest hope to sell more dehydrated potatoes to countries located on the rim of the Asian continent—Japan, Taiwan, and Hong Kong. Also, in recent months there has been substantial interest in developing dehydration capacity in Eastern Europe. Processing activity there is bound to grow much more important the next few years.

SWEETPOTATOES

Disposition of the largest U.S. sweetpotato crop since 1970 continues routinely with SRS grower prices averaging \$9.80 per cwt in March against \$10.00 for March 1974. California f.o.b. prices were slightly ahead of a year earlier, while on the Atlantic Seaboard these figures were less than last year. Louisiana prices also had been lower but, with the end of shipping activity approaching, prices in that State advanced during March. Average prices showed some of the usual advances throughout the storage season, even though they started out from a record high base last fall.

Fresh Market Movement Up

The Market News Service reported that total fresh movement as of early April was up a fourth from a year earlier. Although these heavier supplies have been moving at prices lower than a year earlier, demand for sweets has been fairly good this season. During February and early March, prices for cured Porto Ricos were about 75 cents a crate lower than a year earlier in both North Carolina and Louisiana. However, by late March these prices advanced and were even with or above a year earlier. Supplies and shipping activity declined seasonally in April, with prices still showing end-of-season strength.

Some Canned Market Weakness

With heavy supplies in canners' hands, some price weakness has developed in wholesale prices for consumer size cans. Trade reports suggest sluggish movement in recent weeks. The list price of \$9.20 per case of 24/303s is sharply higher than the \$7.75 of March 1974. No doubt there is substantial consumer resistance to the price rises which have occurred the past two seasons. Moreover, the industry is heading toward a heavy carryover position this fall and canners are not likely to be active purchasers of raw product from the 1975 crop.

Prospective plantings reported in mid-March show that U.S. sweetpotato growers expect to plant only 1 percent fewer acres this season. Among the more important States, the largest declines, 11 percent in Louisiana and 12 percent in Virginia, offset important gains in North Carolina, California, Mississippi, and Texas. With average yields, such a small cut would probably mean lower grower prices this fall because 1975 does not seem to be shaping up as a year of strong canner needs.

MUSHROOMS

Combined January and February imports of canned mushrooms to the United States were 8.7 million pounds, a jump of 1.8 million pounds compared with 1974. The declared value of mushroom imports was \$60 million, up 38 percent from last year. A gain in the unit

cost of imports suggest a possible recovery in expected final demand for all mushroom products.

Kennett Square prices for clean-cut mushrooms in bulk for repacking have run steadily at the \$0.42-\$0.44 per pound level during the first 4 months of 1975, reflecting little change year-to-year. Clean cut stock for processing, reported by the Commonwealth of Pennsylvania's "Mushroom Market News", has recovered from canned product recall which induced low 1974 prices. Most product is moving at \$0.35-\$0.36 per pound, 5 percent ahead of last year's price.

For 1975/76, the outlook for mushroom production information is unclear, in part because some proposals have been made suggesting USDA suspension of funding for statistical reporting on mushrooms in fiscal year 1976. Traditionally, annual reports on the industry are issued toward the end of August.

Domestic Demand Fairly Strong

Domestic demand this year is not being pinched by tight supplies. Retailers, canners, and institutional users are having no difficulty in securing their needs. A year earlier this could not be said. As a result, domestic use of the 1974 crop is expected to be moderately ahead of most recent marketing years, though certainly not enough more to stimulate prices or to appreciably dent this year's heavy supply. Estimates of domestic use can only be roughly calculated, but it is suspected that economic conditions will keep domestic use at a relatively high figure this season. Annual domestic use is about 13.8 to 14.8 million cwt. This year this figure could approximate 15 million bags.

Government purchases of dry beans to date this fiscal year came to 95,010 cwt compared with 316,380 cwt as of the end of March 1974. These beans have gone for school lunch and needy persons programs.

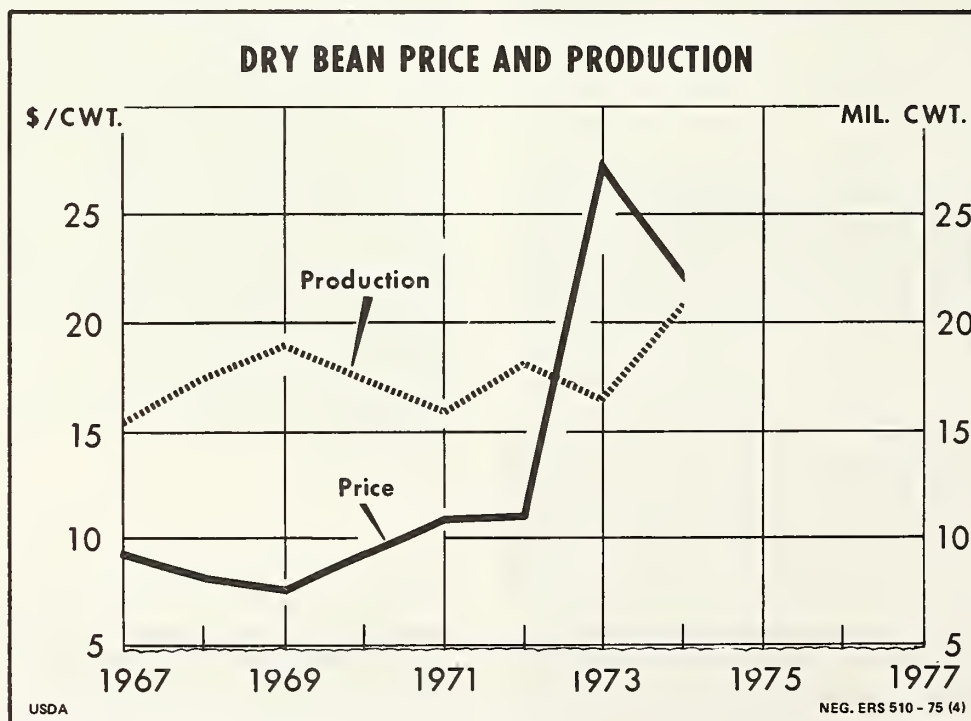
DRY EDIBLE BEANS

Record Supplies to Move

With many farm commodities, prices can move from one-extreme to the exact opposite in 1 year's time. This year the dry bean industry has the largest supply of record to move; a year earlier the supply was a little less than average with foreign and domestic outlets clamoring for more. The weighted average farm price received by growers for all classes of beans in March 1975 was \$18.80 per cwt compared with \$47.20 a year earlier.

Exports Up

Exports of dry beans thus far have exceeded a year earlier, but have been neither sufficiently large to draw down the record supplies, nor able to prevent an abnormally large carryover at the end of the 1974/75 marketing season. Between September 1, the beginning of the current crop year, and March 1, about 3.3 million bags have moved out of the country. This is about 50 percent more than the movement recorded the same months last year. A closer check shows that Mexican purchases of pinto beans are the major cause of this increased export activity. Mexico has bought more than



900,000 cwt; accounting for more than a third of all U.S. export activity thus far this season. Severe weather in that country in 1974 seriously cut production of this staple commodity. Subsequently the Mexican government banned exports and established a retail price ceiling the equivalent of 29 cents a pound, roughly the same or a little below U.S. dealer f.o.b. prices. Some additional purchases, upwards of 220,000 cwt of pinto beans are expected in order to maintain reserve stocks in that country. Under more normal weather conditions in 1975, Mexico would be expected to produce adequate supplies for domestic consumption.

Unfortunately for U.S. white bean growers, export demand, while heavier than a year ago, has not been as active as colored classes. In fact, shipments of navy beans to the U.K.-Northern Ireland are less than half as much as a year earlier. However, other European countries and Canada have been purchasing enough to more than offset reduced exports to the U.K.-Northern Ireland. Navy bean 1974 crop exports to March 1 of 1.04 million cwt were 12 percent more than last year. Activity will have to be sharply higher if a burdensome carryover of this particular class is to be avoided. Looking at export activity among other important classes thus far—great northern beans were up 40 percent to 403,000 cwt, baby lima volume more than doubled to 94,000 cwt, and red kidneys were up to 96,000 cwt.

U.S. Dealer Prices Off

A year ago this spring, bean prices were at their highest level in history, but the drop from these peaks has been a selective one. Colored classes are more favored from the growers' standpoint. Pinto beans in early April were in the \$29 per cwt range against \$60 in March 1974, but pea beans from Michigan were only \$12.88 this year against \$58 a year earlier. These extremes show how Mexican purchases have propped the U.S. market as pinto production was moderately larger than a year ago. It also reflects the size of the 1974 pea bean crop coupled with only moderately heavier export activity. Blackeye peas are another class selling at bargain levels this year. California quotations have been in \$12-14 per cwt range most of this market season. Baby lima prices have also weakened steadily since the first of this year. As a result, dealer prices in the \$13 range are the lowest in 3 years. Large limas in the \$21-22 price range in March and early April are also the lowest since March 1972. Despite a relatively large 1974 crop, red kidney bean prices have held up well (\$26-\$28 per cwt), reflecting the stronger demand for colored beans and the heavy export of pintos. Weakening great northern prices are the result of heavy supplies of white beans.

The 1975 Outlook

Unless exports of white beans pick up dramatically between now and September, the U.S. bean industry will

have about the largest, or even possibly a record large, carryover into the 1975/76 market season. This resulted from heavy yields from larger 1974 Michigan plantings of pea beans. Nonetheless 1974 pea bean production did not set any record. Currently depressed white bean prices have dampened grower enthusiasm for 1975. The March Prospective Plantings report called for an 8 percent cut in Michigan dry bean acreage this year. This would imply a similar cut in pea bean acreage, although other classes—kidney, pinto, and cranberry beans—each are also grown in a limited way in that State. An 8 percent acreage cut nationwide represents current grower thinking about 1975. The largest acreage drop expected this coming season is in California where 67,000 fewer acres (30 percent) are planned. This represents an attempt to compensate for relatively heavy supplies of blackeye peas and limas. On the other hand, some States which are usually heavy in pinto production expect to put in the same or larger plantings. The Red River Valley (of the North) is one conspicuous exception.

The sharply contrasting price pattern between white and colored beans is expected to continue until the potential of the 1975 crop is evaluated by the trade late this summer. In the absence of any special export program, white bean prices are expected to remain close to current low levels, with colored bean prices generally steady but at a much higher level.

The 8 percent smaller intended acreage would still provide more than adequate supplies of beans for the 1975/76 sales season. Average yields from 1975 would result in a crop of slightly more than 18 million cwt. Coupled with an expected heavy carryover of old crop beans, the 1975/76 supply would still exceed 21 million cwt. This would be about 1½ million more than typical domestic use plus the current level of exports.

Under these conditions any price improvements this fall may be selective at best, with some recovery possible in white bean prices. Colored classes would likely move downward since Mexico ordinarily would not be needing large supplies again. But average prices this fall for all classes might be close to or less than the current \$18.80 per cwt U.S. weighted average of all classes. For the first time in several years, there will be no price support loans available through USDA for 1975 crop beans.

DRY BEANS

After trending steadily downward since the beginning of the marketing year, dry pea and lentil prices have held steady since February. Dealer prices for yellows and greens are only fractions of the record attained a year earlier, while lentils are now worth about half as much. The SRS average price received by growers for dry peas was \$7.20 in March compared with \$30.40 the same month in 1974. Still, the current price is higher than March of any other year. With heavy supplies to move, prices are expected to hold near current levels until fall.

Heavy export activity last November helped push overseas sales of peas and lentils to March 1-32 percent above the supply-restricted movement a year earlier. Export activity in 1974/75 compares rather closely with volume 2 years earlier. This season, lentil exports have been heavy relative to last year and prices have not fallen as sharply as with green and yellow peas. Continental European outlets are using substantial quantities of lentils this year while overseas movement of greens has actually lagged behind 1973/74. The U.K. has always been an important user of green peas, but their takings thus far this season have been smaller than last year. Several Latin American nations—notably Venezuela, Colombia, Brazil, and Trinidad—and Japan have also been fairly active buyers of peas. With exports expected

to account for at least 60 percent of the U.S. 1974 output, foreign demand is the dominant factor in the domestic price picture. Only about a fifth of the U.S. 1974/75 supply will be used for food in this country. The remainder is likely to be carried over into the next marketing year, a more or less usual event.

With the prospect of a larger but not a record large carryover into the 1975/76 marketing season, growers intend to plant nearly a tenth less acreage of dry peas this season.

In Washington, the leading State, the full tenth cut is planned, and in adjoining Idaho 6 percent less is liely. Cuts this size could be expected to maintain or possibly improve prices moderately by this fall. The strength of foreign demand is the key.

Table 7—Vegetables, fresh: Average f.o.b. shipping point prices, per hundredweight, United States, indicated periods, 1974 and 1975

Commodity	1974		1975		
	February	March	January	February	March 1-15
	Dollars	Dollars	Dollars	Dollars	Dollars
Asparagus	46.10	35.20	---	37.80	33.80
Beans, snap	21.60	21.70	23.70	16.90	19.30
Broccoli	19.10	15.70	17.30	19.10	15.70
Cabbage	4.96	4.27	5.35	5.28	6.02
Carrots	5.86	5.40	9.15	10.90	9.80
Cauliflower	23.40	19.70	22.50	23.20	25.00
Celery	4.89	4.34	5.46	5.45	6.04
Corn, sweet	9.20	7.70	8.00	11.00	10.00
Cucumbers	13.90	11.30	15.30	---	---
Lettuce	6.61	5.45	8.92	6.51	6.19
Onions	10.50	6.30	3.90	4.39	8.15
Peppers, green	17.20	15.60	25.00	29.90	31.00
Spinach	14.20	13.20	16.00	16.40	14.00
Tomatoes	21.40	16.00	21.50	22.50	18.20

Agricultural Prices, SRS, USDA, issued monthly.

Table 8—Vegetables, commercial for fresh market: Index numbers (unadjusted) of prices received by farmers, as of 15th of the month, United States by months, 1960 to date¹

Period	(1967=100)												
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1960	99	95	87	88	90	74	76	62	61	67	73	77	79
1961	74	74	76	95	83	90	81	65	65	65	76	74	76
1962	94	102	125	109	107	84	73	63	64	66	75	85	87
1963	102	95	82	83	78	88	85	65	62	70	91	94	83
1964	100	103	98	89	83	90	80	76	76	78	101	87	88
1965	80	86	101	106	121	102	85	78	78	84	90	88	92
1966	106	112	102	109	97	99	114	101	91	91	103	99	102
1967	103	99	98	108	103	121	110	86	82	88	100	103	100
1968	118	123	127	132	108	98	94	88	92	91	115	119	109
1969	107	111	109	107	121	100	100	96	94	110	144	132	111
1970	134	130	125	112	124	113	103	95	107	96	105	100	112
1971	114	123	149	140	129	127	121	104	100	118	164	137	127
1972	152	132	119	137	127	126	121	128	130	115	144	140	131
1973	159	157	171	196	182	182	180	134	128	126	130	136	157
1974	142	169	143	148	174	170	165	148	144	157	180	151	158
1975 ²	170	188	172										

¹ All prices reported on f.o.b. basis. ² Preliminary.

Table 9—Vegetables and melons for fresh market: Reported commercial acreage and projected production of principal crops, selected seasons, 1973, 1974, and indicated 1975

Seasonal group and crop	Acreage					Production				
	1973	1974	Indicated	1975		1973	1974	Indicated	1975 ¹	
				Percent of					Percent of	
				1973	1974				1973	1974
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Percent</i>	<i>Percent</i>	<i>1,000 hundred- weight</i>	<i>1,000 hundred- weight</i>	<i>1,000 hundred- weight</i>	<i>Percent</i>	<i>Percent</i>
Winter	174.2	196.1	172.9	99	88	31,076	34,811	30,754	99	88
Spring: ²										
Snap Beans	23.9	24.8	24.4	102	98	775	854	829	107	97
Broccoli ³	12.3	11.9	13.0	106	109	800	1,071	1,079	135	101
Cabbage ³	25.6	23.3	22.6	88	97	4,595	4,344	4,119	90	95
Carrots ³	18.7	17.1	15.5	83	91	3,766	4,539	3,674	98	81
Cauliflower ³	3.9	4.6	4.6	118	100	273	414	428	157	103
Celery ³	9.1	9.0	9.1	100	101	4,302	4,154	4,286	100	103
Sweet corn	39.1	33.9	34.1	87	101	4,143	3,603	3,444	83	96
Cucumbers	16.5	16.9	16.2	98	96	1,559	1,629	1,555	100	95
Eggplant6	.8	.8	133	100	156	180	194	124	108
Escarole	2.2	2.1	2.3	105	110	339	296	326	96	110
Lettuce	54.2	48.2	51.1	94	106	12,596	12,489	12,571	100	101
Green peppers ³	10.1	9.5	11.1	110	117	1,053	1,035	1,154	110	111
Spinach	2.3	2.4	2.3	100	96	157	158	153	97	97
Tomatoes	35.2	30.9	31.2	89	101	4,567	4,592	4,368	96	95
Total 14 Vegetables ⁴	253.8	235.3	238.4	94	101	39,081	39,358	38,180	98	97
Honeydew Melons ...	2.4	2.1	2.2	92	105	336	231	246	73	106
Cantaloups	26.5	22.4	20.9	79	93	3,417	2,957	2,613	76	88
Watermelons	83.5	81.2	81.8	98	101	11,001	10,504	9,980	91	95
Total melons ⁴	112.4	105.7	104.9	93	99	14,754	13,692	12,839	87	94

¹ Based on average yield per acre. ² April, May and June. ³ Includes fresh market and processing. ⁴ May not add to total due to rounding.

Vegetables for Fresh Market, SRS, USDA.

Table 10—Vegetables, frozen: Cold storage holdings and indicated disappearance, January 1 to April 1

Commodity	April 1 stocks			January 1-April 1 net change		
	1973	1974	1975 ¹	1973	1974	1975 ¹
	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Asparagus	15	12	6	-7	-5	-6
Beans, lima:						
Fordhook	23	19	24	-11	-8	-6
Baby	33	39	51	-22	-22	-17
Total	56	58	75	-33	-30	-23
Beans, snap:						
Regular	58	76	91	-40	-42	-34
French style	33	36	38	-18	-19	-16
Total	91	112	129	-58	-61	-50
Broccoli:						
Spears	33	41	51	-16	-2	-8
Chopped and cuts	28	33	35	-10	1	-1
Total	61	74	86	-26	-1	-9
Brussels sprouts	32	34	33	-14	-17	-14
Carrots	60	107	131	-37	-13	-25
Cauliflower	24	41	50	-25	-24	-19
Corn, sweet:						
Cut	90	118	141	-76	-71	-83
On-cob	60	63	54	-26	-40	-41
Total	150	181	195	-102	-111	-124
Mixed Vegetables	27	37	38	-3	9	3
Okra	8	13	19	-9	-9	-14
Onions:						
Rings	8	10	11	N.A.	1	1
Other frozen	6	16	16	N.A.	4	-2
Total	14	26	27	N.A.	5	-1
Peas, blackeyed	8	10	12	-4	-4	-3
Peas, green	84	86	134	-84	-94	-88
Peas and carrots	11	11	13	-2	2	0
Spinach	36	64	63	-13	1	-7
Southern greens	27	37	28	-19	-6	-14
Other vegetables	143	153	170	-56	-29	-43
Total vegetables ²	846	1,057	1,209	-492	-387	-437
Potatoes:						
French fried	663	615	691	69	158	127
Other frozen	92	118	127	9	25	-2
Total frozen potatoes	755	733	818	78	183	125
Grand total ²	1,601	1,789	2,027	-414	-204	-312

¹ Preliminary. ² May not add to total due to rounding. N. A.—Not available.

Cold storage, SRS, USDA, issued monthly.

Table 11—Fresh Vegetables: Retail price, marketing margin, and grower and packer return per unit, sold in New York City, indicated months, 1974 & 1975

Commodity, month, and retail unit	Retail price	Marketing margin		Grower and packer return (Fob shipping point prices ^{1, 2})	
		Absolute	Percentage of retail price	Absolute	Percentage of retail price
	<i>Cents</i>	<i>Cents</i>	<i>Percent</i>	<i>Cents</i>	<i>Percent</i>
Carrots (Pound)					
Jan. 1975	26.6	16.9	64	9.7	36
Dec. 1974	29.3	15.9	54	13.4	46
Jan. 1974	21.4	13.3	62	8.1	38
Celery (Pound)					
Jan. 1975	23.9	16.2	68	7.7	32
Dec. 1974	27.2	22.3	82	4.9	18
Jan. 1974	23.0	17.8	77	5.2	23
Cucumbers (Pound)					
Jan. 1975	50.6	21.5	42	29.1	58
Dec. 1974	26.4	17.2	65	9.2	35
Jan. 1974	29.5	16.9	57	12.6	43
Lettuce (Head)					
Jan. 1975	43.5	33.2	76	10.3	24
Dec. 1974	47.4	33.7	71	13.7	29
Jan. 1974	37.5	30.8	82	6.7	18
Onions, dry yellow (Pound)					
Jan. 1975	16.6	12.5	75	4.1	25
Dec. 1974	17.7	13.2	75	4.5	25
Jan. 1974	19.9	11.7	59	8.2	41
Potatoes, round white (Pound)					
Jan. 1975	11.8	8.2	69	3.6	31
Dec. 1974	12.5	8.8	70	3.7	30
Jan. 1974	15.1	8.7	58	6.4	42
Potatoes, Russet (Pound)					
Jan. 1975	19.2	12.8	67	6.4	33
Dec. 1974	19.4	13.3	69	6.1	31
Jan. 1974	19.7	12.2	62	7.5	38
Spinach (10-oz. Pkg.)					
Jan. 1975	55.4	43.6	79	11.8	21
Dec. 1974	53.6	40.1	75	13.5	25
Jan. 1974	47.3	36.3	77	11.0	23
Sweet Potatoes, (Pound)					
Jan. 1975	26.7	11.7	44	15.0	56
Dec. 1974	24.7	10.5	42	14.2	58
Jan. 1974	27.0	9.8	36	17.2	64

¹ For quantity of product equivalent to retail unit sold to consumers: Because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. ² Production areas: Carrots-California, Celery-California, Cucumbers-Florida,

Lettuce-California, Onions-New York, Potatoes, Round White-New York, Potatoes, Russet-Idaho, Spinach-Texas, Sweet Potatoes, Louisiana.

Table 12—Canned vegetables: Commercial packs 1973 and 1974 and canners' and wholesale distributors' stocks 1974 and 1975, United States

Commodity	Pack		Stocks					
	1973	1974	Canners			Wholesale distributors		
			Date	1974	1975	Date	1974	1975
	1,000 cases 24/303's	1,000 cases 24/303's		1,000 cases 24/303's	1,000 cases 24/303's		1,000 cases 24/303's	1,000 cases 24/303's
Major commodities								
Beans, snap	55,002	62,319	Mar. 1	15,969	26,531	Jan. 1	4,474	5,151
Beets	11,324	14,819	Jan. 1	4,751	8,092	Jan. 1	1,180	1,454
Corn, sweet	55,227	46,431	Mar. 1	19,373	17,738	Jan. 1	4,080	5,805
Peas, green	29,558	33,120	Mar. 1	6,411	10,549	Jan. 1	3,168	3,636
Sauerkraut	² 11,834	² 15,044	Mar. 1	4,250	5,841	Jan. 1	748	870
Total	162,945	171,733		50,574	68,751		13,650	16,916
Tomatoes and Products ³								
Tomatoes	45,431	43,794	Jan. 1	23,104	21,938	Jan. 1	4,284	5,362
Tomato juice	33,936	36,133	Jan. 1	22,260	22,111	Jan. 1	2,358	2,447
Total	79,367	79,927		45,364	44,049		6,642	7,809
Other commodities								
Asparagus	5,794	5,643	Mar. 1	1,199	2,401	Jan. 1	717	602
Beans, lima	3,150	2,523	Mar. 1	1,212	973	Jan. 1	451	505
Carrots	6,160	7,193	Jan. 1	3,354	5,383	Jan. 1	837	924
Okra ⁴	N.A.	N.A.						
Pickles	² 67,066	² 66,724						
Pimentos	269	N.A.						
Pumpkin and squash	4,632	4,214						
Potatoes	5,658	N.A.						
Sweetpotatoes	11,415	N.A.						
Spinach	8,944	10,834	Mar. 1	1,832	4,124	Jan. 1	659	744
Other greens	4,029	N.A.						
Vegetables, mixed	8,898	N.A.						
Field peas	2,817	N.A.						
Total comparable other items	95,746	97,131		7,597	12,881		2,664	2,775
Grand total comparable items	338,058	348,791		103,535	125,681		22,956	27,500

¹ Estimated. ² Crop for processing converted to a canned basis by applying an overall conversion factor (pickles 112 and sauerkraut 54 cases equivalent to 1 ton fresh). ³ Pack and stocks data not complete for catsup, paste, sauce and puree. ⁴ Okra, okra and tomatoes, and okra, corn and tomatoes. N.A. - not available.

Canners' stock and pack data from the National Canners Association, unless otherwise noted. Wholesale distributors, stock from United States Department of Commerce, Bureau of the Census.

Table 13—Potatoes, winter and spring: Acreage, yield per acre and production, 1973, 1974, and 1975

Seasonal group and State	Acreage			Yield per acre			Production		
	Harvested		For harvest 1975	1973	1974	1975 ¹	1973	1974	1975 ¹
	1973	1974							
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Cwt.</i>	<i>Cwt.</i>	<i>Cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>	<i>1,000 cwt.</i>
Winter, total	14.0	13.7	14.6	204	214	203	2,853	2,933	2,970
Spring:									
North Carolina	11.2	9.4	7.5	145	150	145	1,624	1,410	1,088
Florida-Hastings	19.0	18.8	16.2	180	175	190	3,420	3,290	3,078
Other	2.1	2.8	1.9	150	170	175	315	476	333
Alabama	11.0	12.5	10.6	118	145	120	1,298	1,813	1,272
Mississippi	2.0	2.0	2.2	85	95	90	170	190	198
Louisiana	2.3	2.8	2.9	83	90	90	191	252	261
Texas	6.7	7.4	5.4	125	130	120	838	962	648
Arizona	9.9	8.6	6.5	210	260	255	2,079	2,236	1,658
California	34.7	35.5	27.6	325	385	355	11,278	13,668	9,798
Total	98.9	99.8	80.8	214	243	227	21,213	24,297	18,334

¹ Indicated.

Crop Production, SRS, USDA.

Table 14—Potatoes, summer and fall: Prospective plantings, with comparisons, 1973, 1974, and 1975

Seasonal group	Planted acreage			
	1973	1974	Indica- ted 1975	1975 as percent- age of 1974
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Percent</i>
Winter ¹	14.0	13.9	14.6	105
Spring ²	99.9	100.7	84.0	83
Summer ³	129.2	135.1	120.1	89
Fall ³	1,085.0	1,161.2	1,098.4	95
U.S. total	1,328.1	1,410.9	1,317.1	93

¹ Includes acreage planted in preceding fall. ² Acreage planted and intended plantings as of March 1. ³ Intended acreage for 1975 as of March 1.

Prospective Plantings, SRS, USDA.

Table 15—Potatoes: Prices f.o.b. shipping points, at terminal markets, and to growers, per hundredweight, indicated periods, 1974 and 1975

Item	Week ended						
	1974			1975			
	Feb. 16	Mar. 16	Apr. 13	Jan. 18	Feb. 15	Mar. 15	Apr. 12
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
F. o. b. shipping points:							
New stock							
Florida, Dade County							
U.S. No. 1, Size A, Round Reds ¹	11.64	11.10	13.50	---	---	4.80	5.00
Old stock							
Colorado, San Luis Valley							
Red McClures ²	9.00	10.00	10.50	4.50	3.88	3.25	2.88
Idaho, Idaho Falls							
Russets ³	9.65	9.38	10.62	4.12	3.55	3.38	3.84
Maine, Aroostook County							
U.S. No. 1 Size A, Mostly Katahdin ¹	9.40	10.16	12.90	2.24	2.00	1.82	2.14
New York, Upstate							
Round Whites ¹	11.04	11.00	---	3.40	3.10	3.24	3.12
Michigan							
Round Whites ¹	9.36	10.40	---	---	3.24	3.20	---
Tuesday nearest mid-month							
	1974			1975			
	Feb. 12	Mar. 12	Apr. 16	Jan. 14	Feb. 18	Mar. 18	Apr. 8
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Terminal markets:							
New York:							
New stock							
Florida, Round Reds ^{1 5}	13.50	14.00	17.50	---	11.00	8.00	8.00
Old stock							
Long Island, various Round Whites ^{1 5}	10.00	11.00	14.00	4.30	4.20	3.80	3.50
Maine, Katahdin ^{1 4 5}	10.50	11.50	15.00	4.30	4.20	4.00	3.70
Idaho, Russets ^{1 5}	14.00	15.00	16.70	10.20	9.50	8.30	8.30
Chicago:							
New stock							
Florida, Round Reds ^{1 5 6}	15.50	15.00	18.00	---	---	7.80	8.00
Old stock							
Idaho, Russets ^{5 6}	12.75	14.25	16.50	8.50	7.50	7.00	7.25
Minnesota-North Dakota, Round Reds ^{5 6}	9.75	11.25	13.00	5.15	5.15	4.40	4.25
Month							
	1974			1975			
	Feb.	Mar.	Apr.	Jan.	Feb.	Mar.	Apr.
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
U.S. price received by growers	6.23	7.08	7.96	3.32	3.17	3.16	N.A.
U.S. average parity price	4.67	4.70	4.81	5.19	5.22	5.19	N.A.

¹ 50-pound price doubled. ² 2-inch up, washed. ³ 10-oz. minimum. ⁴ 2-inch minimum. ⁵ U.S. No. 1, Size A. ⁶ Street sales. F.o.b. prices are the simple averages of the mid-point of the

range of daily prices. Terminal market prices are for Tuesday of each week as reported by Market News representatives of the Fruit and Vegetable Division of AMS. N.A.—Not available.

Table 16—Sweetpotatoes: F.o.b. prices at Louisiana and California points and terminal market prices at New York and Chicago for stocks of generally good quality and condition (U.S. No. 1, when available), indicated periods, 1974 and 1975

Location and variety	Unit	Week ended						
		1974			1975			
		Feb. 16	Mar. 16	Apr. 13	Jan. 18	Feb. 15	Mar. 15	Apr. 12
		Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
F.o.b. shipping points								
S.W. Louisiana points								
Porto Rico type, U.S.								
No. 1, cured	50 pound crate	7.38	7.38	7.25	6.75	6.75	7.10	7.75
California, Porto Rico type, centennial	40 pound carton	7.00	7.00	7.00	6.30	6.30	7.50	---
		Tuesday nearest mid-month						
		1974			1975			
		Feb. 12	Mar. 12	Apr. 16	Jan. 14	Feb. 18	Mar. 18	Apr. 8
		Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
Terminal markets								
New York:								
New Jersey, orange Jersey type	Bushel carton	5.75	5.25	5.50	5.00	5.00	5.00	---
North Carolina, Porto Rico type	carton	9.00	8.00	7.75	7.25	7.35	7.75	10.50
Chicago:								
Louisiana, Porto Rico type, cured	50-pound carton	8.25	8.65	8.50	8.15	8.00	9.50	---

F.o.b. prices are simple averages of the mid-point of the range of daily prices. Market prices are for Tuesday of each week as

reported by Market News representatives of the Fruit and Vegetable Division of AMS.

Table 17—Sweetpotatoes: Plantings, 1973, 1974 and indicated 1975

Area	Acreage			
	1973	1974	Indica- ted 1975 ¹	1975 as percent- age of 1974
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Percent</i>
Central Atlantic ² ..	11.6	11.7	10.7	91
Lower Atlantic ³ ..	35.0	39.0	41.0	105
Central ⁴	64.7	66.2	63.3	96
California	6.4	6.0	6.4	107
United States ...	117.7	122.9	121.4	99

¹ Indicated as of March 1. ² New Jersey, Maryland, and Virginia. ³ North Carolina, South Carolina, and Georgia. ⁴ Tennessee, Alabama, Mississippi, Arkansas, Louisiana, and Texas.

Prospective Plantings, SRS, USDA.

Table 18—Average price per hundredweight received by farmers for sweetpotatoes, dry edible beans, and dry field peas, United States, indicated periods, 1974 and 1975

Commodity	1974		1975		
	February 15	March 15	January 15	February 15	March 15
	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Sweetpotatoes	9.50	10.00	9.30	9.55	9.80
Beans, dry edible	41.10	47.20	20.20	18.40	18.80
Peas, dry field	28.30	30.40	8.70	7.20	7.20

Agricultural Prices, SRS, USDA, issued monthly.

Table 19—Beans, dry edible: Prospective plantings for 1975 season, with comparisons

Group of States	Acreage planted			
	1973	1974	Indicated 1975 ²	1975 as percentage of 1974
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Percent</i>
New York	40	44	48	109
Michigan	570	610	560	92
Nebraska, Montana, Idaho, Wyoming, and Washington	259	314	315	100
Minnesota and North Dakota	140	232	193	83
Kansas, Colorado, and Utah	217	209	227	109
California	161	227	160	70
Other States	8	11	12	109
United States	1,395	1,647	1,515	92

¹ Excludes beans grown for garden seed. ² Indications as of March 1.

Prospective Plantings, SRS, USDA.

Table 20—Peas, dry field: Prospective plantings for 1975 season, with comparisons^{1 2}

State	Acreage planted			
	1973	1974	Indicated 1975 ³	1975 as percentage of 1974
	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>1,000 acres</i>	<i>Percent</i>
Minnesota ⁴	8.0	2.0	---	---
Idaho	50.0	90.0	85.0	94
Washington	85.0	122.0	110.0	90
Oregon	3.6	6.0	6.0	100
United States ...	146.6	220.0	201.0	91

¹ In principal commercial producing States. ² Excludes both Wrinkled Seed Peas and Austrian Winter Peas. ³ Indications as of March 1. ⁴ Discontinued in 1974.

Prospective Plantings, SRS, USDA.

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FLORIDA CUCUMBERS AND GREEN PEPPERS: PRODUCTION, MARKETING PATTERNS, PRICES, AND MARGINS

By

Alfred J. Burns and Joseph C. Podany

ABSTRACT: Florida is the leading domestic producer of many fall, winter, and spring vegetables. Increased competition from Mexican imports has hurt the Florida industry and, for some vegetables, has threatened the State's position as the major U.S. supplier. This report traces trends in production, marketing, prices, margins, and grower returns for Florida cucumbers and green peppers.

Key words: Cucumbers, green peppers, production, marketing, prices, margins, Florida, Mexico.

Summary

Cucumber and green pepper imports from Mexico increased sharply since the mid-1960's boosting that country's share of the U.S. market for both vegetables at the expense of U.S. suppliers. Florida's share of the market for peppers declined sharply in 1970, when a virus outbreak cut that State's production. Although the State's pepper crop has now partially recovered, Florida has not fully regained its former share. Florida generally maintained its share of the U.S. market for cucumbers since the mid-1960's as other State's share was reduced.

Western and midwestern cities have declined in importance as markets for Florida cucumbers and green peppers since the mid-1960's as a result of larger Mexican sales in many of these cities. Eastern cities provide the major market for the two Florida vegetables, with New York City being the single most important market.

The retail price of cucumbers and green peppers in New York City has increased since the mid-1960's, with most of the rise in green pepper prices occurring after 1969. The wholesale-retail margin, the shipping point-wholesale margin, harvesting, packing, and selling costs, and Florida grower returns also increased in the period. Other than a slight widening in the percent shipping point-wholesale margin for green peppers, the market shares, or percentage of the retail value, taken by the grower and other market factors did not show any significant trend since the mid-1960's for either cucumbers or green peppers.

Production

Data on domestic production of cucumbers and green peppers are from the Statistical Reporting Service (SRS). Imports are reported by the Bureau of the Census.

Cucumbers

The total U.S. supply of fall, winter, and spring cucumbers for fresh consumption, while fluctuating seasonally, remained fairly stable for 1964/65-1973/74 (table 1). However, the United States became more dependent on foreign imports, which more than tripled during the 10 seasons, to offset a sharp decline in U.S. production. All of the increase in cucumber imports was from Mexico. Imports from Mexico totaled 86,000 tons in 1973/74, more than five times the quantity supplied in 1964/65. Mexico accounted for 93 percent of U.S. imports and 38 percent of total U.S. fall, winter, and spring supplies in 1973/74, both considerably higher than in 1964/65.

Fall, winter, and spring cucumbers are produced principally in six States. Florida is the major grower, accounting for 41-50 percent of the U.S. crop in nine of the last 10 seasons. Most of the decline in U.S. production occurred in California, North Carolina, and South Carolina. Production in Florida, although fluctuating seasonally, remained stable over the 10 seasons. Florida maintained its share of total U.S. supply during this period.

Green Peppers

The total U.S. supply of winter and spring green peppers increased from 75,800 tons in 1964 to 125,300 tons, or 60 percent (table 2). Although U.S. production increased slightly, imports went up faster during the period and accounted for an increasing share of the total supply.

Mexico is the primary exporter of green peppers to the United States, supplying 92-97 percent of each year's imports. Imports from Mexico totaled 40,400 tons in 1974, more than seven times the quantity supplied in 1964. Mexico accounted for nearly one-third

Table 1—Cucumbers, fresh, fall, winter and spring: U.S. production, imports, and total U.S. supply, 1964/65-1973/74

Season	U.S. production					Imports					Total U.S. supply
	Florida		Other States ¹		Total	Mexico		Other countries ²		Total	
	Amount	Share of total supply	Amount	Share of total supply		Amount	Share of total supply	Amount	Share of total supply		
	1,000 tons	Percent	1,000 tons	Percent	1,000 tons	1,000 tons	Percent	1,000 tons	Percent	1,000 tons	1,000 tons
1964/65	94.2	44.6	87.6	41.5	181.8	15.5	7.4	13.8	6.5	29.3	211.1
1965/66	101.5	44.8	89.4	39.5	190.9	23.2	10.3	12.2	5.4	35.4	226.3
1966/67	82.1	36.6	98.4	43.9	180.5	30.3	13.5	13.5	6.0	43.8	224.3
1967/68	99.0	42.8	94.4	40.8	193.4	29.2	12.7	8.6	3.7	37.8	231.2
1968/69	72.8	32.0	94.2	41.5	167.0	48.3	21.3	11.9	5.2	60.2	227.2
1969/70	67.8	29.4	96.8	41.9	164.6	55.7	24.1	10.6	4.6	66.3	230.9
1970/71	69.0	30.8	69.8	31.2	138.8	78.0	34.8	7.1	3.2	85.1	223.9
1971/72	87.3	38.4	61.3	27.0	148.6	71.9	31.7	6.5	2.9	78.4	227.0
1972/73	84.6	35.8	59.8	25.3	144.4	86.8	36.7	5.3	2.2	92.1	236.5
1973/74	72.2	31.9	60.6	26.8	132.8	86.5	38.2	6.9	3.0	93.3	226.1

¹ California, North Carolina, South Carolina, Texas, and Virginia. ² Bahamas, Canada, and Guatemala.

Table 2—Green peppers, fresh, winter and spring: U.S. production, imports and total U.S. supply, 1964-74

Season	U.S. production					Imports					Total U.S. supply
	Florida		Other States ¹		Total	Mexico		Other countries ²		Total	
	Amount	Share of total supply	Amount	Share of total supply		Amount	Share of total supply	Amount	Share of total supply		
	1,000 tons	Percent	1,000 tons	Percent	1,000 tons	1,000 tons	Percent	1,000 tons	Percent	1,000 tons	1,000 tons
1964	64.2	84.7	6.0	7.9	70.2	5.4	7.1	.2	.3	5.6	75.8
1965	61.8	81.0	6.0	7.9	67.8	7.9	10.3	.6	.8	8.5	76.3
1966	69.8	82.6	3.2	3.8	73.0	10.7	12.7	.8	.9	11.5	84.5
1967	72.3	78.0	7.5	8.1	79.8	12.1	13.0	.8	.9	12.9	92.7
1968	77.6	83.8	3.8	4.1	81.4	10.4	11.2	.8	.9	11.2	92.6
1969	69.9	72.4	6.3	6.5	76.2	18.8	19.5	1.5	1.6	20.3	96.5
1970	32.0	46.8	6.3	9.2	38.3	28.2	41.2	1.9	2.8	30.1	68.4
1971	39.6	43.4	15.8	17.3	55.4	34.3	37.6	1.5	1.7	35.8	91.2
1972	53.2	52.3	18.5	18.2	71.7	28.4	27.9	1.6	1.6	30.0	101.7
1973	63.2	53.8	13.1	11.1	76.3	39.7	33.8	1.5	1.3	41.2	117.5
1974	66.2	52.8	17.4	13.9	83.6	40.4	32.3	1.3	1.0	41.7	125.3

¹ California, Louisiana and Texas. ² Principally Dominican Republic.

of total U.S. supplies in 1974, considerably more than in 1964.

U.S. production of winter and spring green peppers are reported in California, Florida, Louisiana, and Texas. Florida accounted for over 90 percent of the U.S. crop in 1964-69. Florida's crop was sharply reduced beginning in 1970, as the result of a severe outbreak of virus. Production has partially recovered and accounted for nearly 80 percent of the U.S. crop in 1973/74. However, Florida's share of total U.S. supplies dropped from 85 percent in 1964 to 53 percent in 1974.

Marketing Patterns

To get a better idea of where Florida cucumbers and green peppers are being sold, unload data from the

Agricultural Marketing Service (AMS) for 1963 through 1973 were evaluated. These data identify the source of monthly rail and truck unloads in 41 major U.S. cities. Carlots were converted to tons using AMS conversion factors to allow for different carlot weights during the period.

Cucumbers

A large part of Florida's cucumber production is marketed in the East—60 percent of the 1971-73 unloads went to eastern cities, with New York City alone taking about 25 percent (Figure 1). The Midwest was the second largest market, taking 28 percent of the unloads. Eleven percent were unloaded in the South and only 1 percent in the West. Mexico supplied most of the

cucumbers unloads in many western and midwestern cities during its shipping season.

Changes have occurred in the distribution of Florida cucumbers since the early 1960's. The quantity of Florida cucumbers unloaded in 41 U.S. cities declined slightly over 10 percent from 1963-65 to 1971-73 (Figure 2). The trading area for Florida cucumbers narrowed somewhat, with 5 percent more unloads moving to southern cities. Considerably fewer Florida cucumbers went to the West (74 percent) and the Midwest (18 percent), reflecting stronger competition from Mexico for these markets.

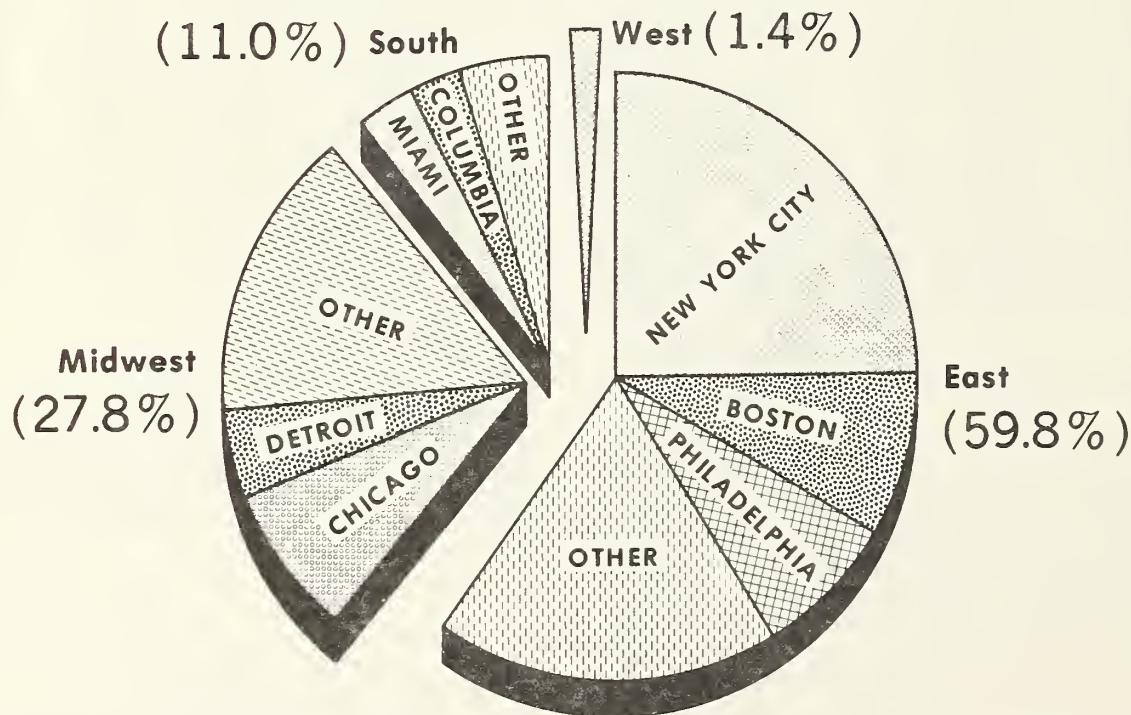
Trucks are playing an increasingly important role in moving Florida cucumbers to market. About 95 percent of the 41 city unloads arrived by truck in 1971-73, up from 84 percent in 1963-65 (Figure 3). Truck transportation's share increased in each region, with the Midwest having the greatest increase. Over 90 percent of the unloads in each region moved by truck in 1971-73. There were no reported rail unloads of Florida cucumbers in any southern or western city in 1971-73.

Figure 4 shows monthly cucumber unloads in New York City for 1971-73 by place of origin. Florida is the major supplier for New York City in the fall and spring months. Florida supplies begin in October and end in June, peaking in November and again in May. Mexican cucumbers dominate the winter months, when Florida shipments are usually limited. In the summer New York City unloads are from various States, mainly New York, New Jersey, and Virginia.

Green Peppers

Marketing patterns for Florida green peppers are similar to those of Florida cucumbers. Nearly two-thirds of green pepper unloads from Florida went to eastern cities in 1971-73 (Figure 5). New York City accounted for slightly over one-third of the total, with Boston and Philadelphia taking about 10 percent each. The Midwest took 20 percent of the unloads, the South 11 percent, and the West 3 percent.

DISTRIBUTION OF FLORIDA CUCUMBER UNLOADS IN THE U.S., 1971-73



USDA

NEG. ERS 1047 - 75 (4)

Figure 1

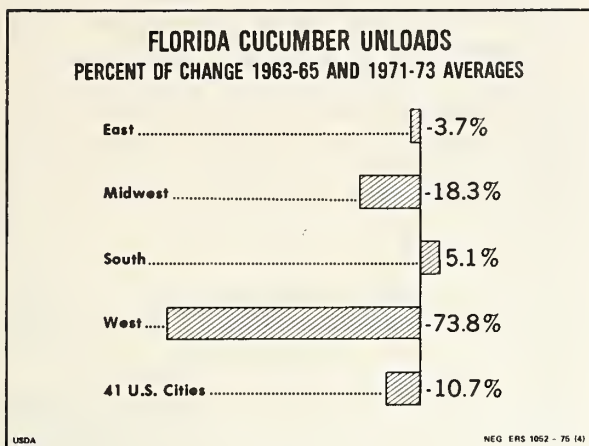


Figure 2

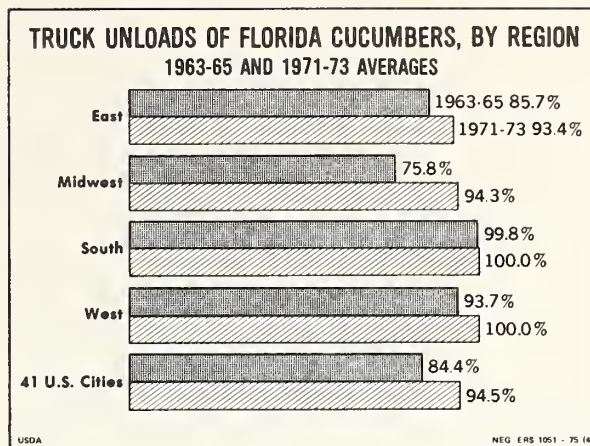


Figure 3

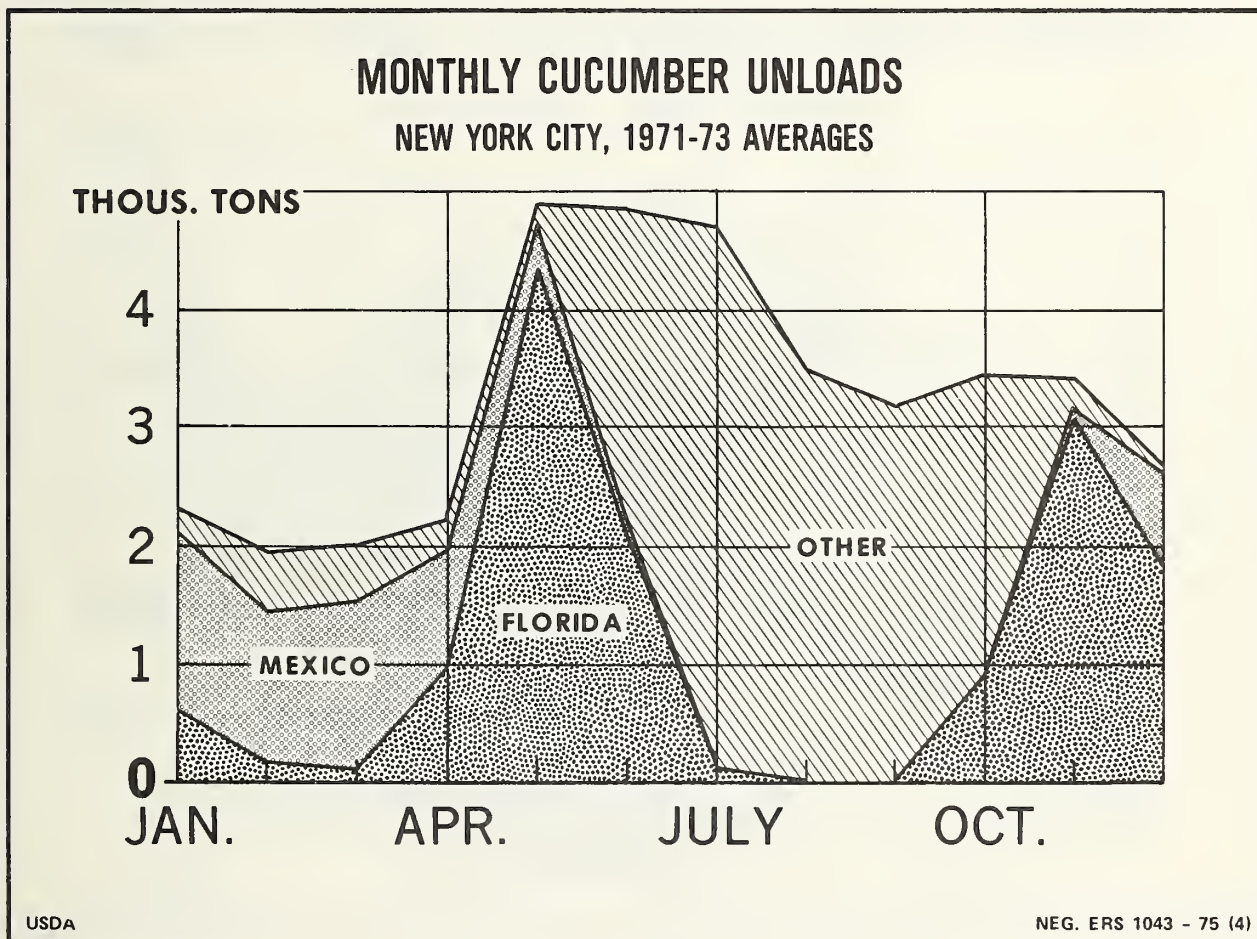


Figure 4

The quantity of Florida green peppers unloaded in 41 U.S. cities declined 9.6 percent from 1963-65 to 1971-73 (Figure 6). As with cucumbers, most of the decline was in the West (65 percent) and the Midwest (16 percent), reflecting increased competition from Mexican peppers. Unloads in the East increased about 1 percent.

Trucks also play an increasingly important role in the movement of Florida green peppers, with their share of the 41 city unloads rising from 79 percent in 1963-65 to 97 percent in 1971-73 (Figure 7).

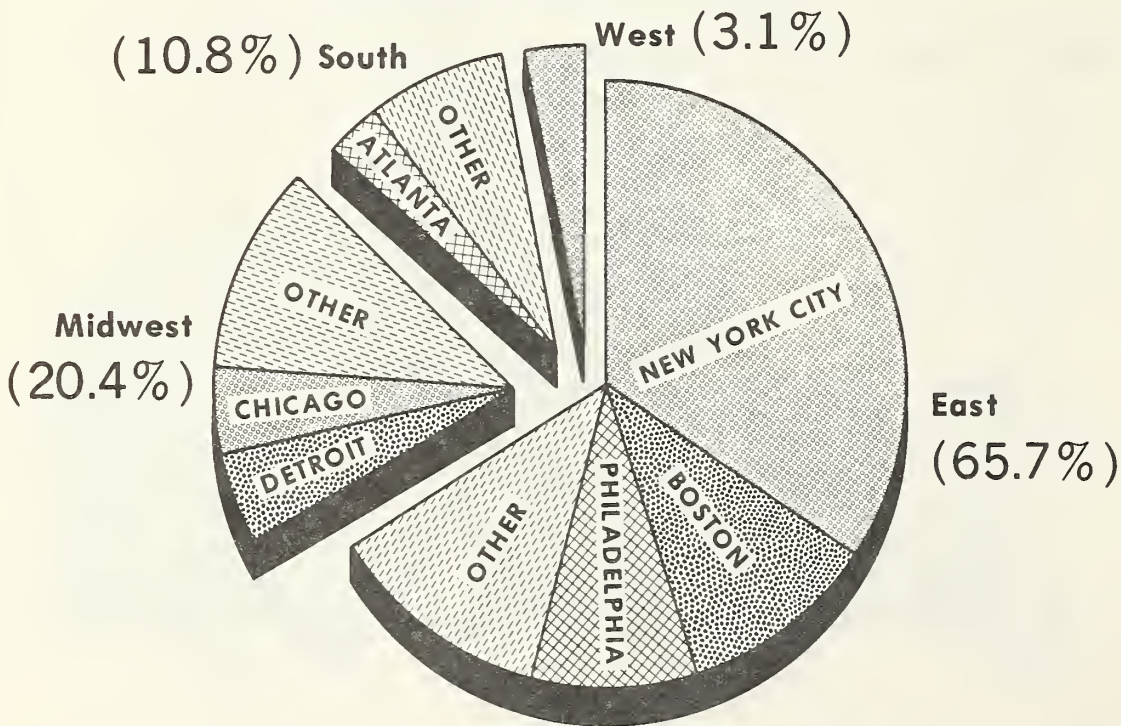
Unloads of Florida green peppers in New York City begin in October and end in August, peaking in January and again in June (Figure 8). Florida peppers clearly dominate the market each month from November through June. The Mexican peppers enter the market each month from December through June, but in a considerably smaller volume than Florida supplies. In the summer, unloads are mainly from Texas and New Jersey.

Prices and Margins

Cucumbers and green peppers were priced at three levels—Florida shipping points and wholesale and retail in New York City. New York City was selected because of its importance in the marketing of Florida cucumbers and peppers. Retail prices were collected monthly by the Bureau of Labor Statistics in a sample of retail stores on Tuesday, Wednesday, and Thursday of the first week containing a Tuesday. The wholesale price used is the Tuesday price for the retail pricing week. The shipping point price used is an average of daily prices for the week preceding the retail pricing week. Shipping point prices and wholesale prices are reported by the Federal-State Market News Service. Monthly prices are weighted by monthly Florida unloads in New York City to obtain the average price for the season.

The retail value of a bushel of cucumbers or peppers is the return to the retailer for saleable cucumbers or peppers (retail price minus 8 percent allowance for spoilage loss during the marketing process). Harvesting,

DISTRIBUTION OF FLORIDA GREEN PEPPER UNLOADS IN THE U.S., 1971-73



USDA

NEG. ERS 1048 - 75 (4)

Figure 5

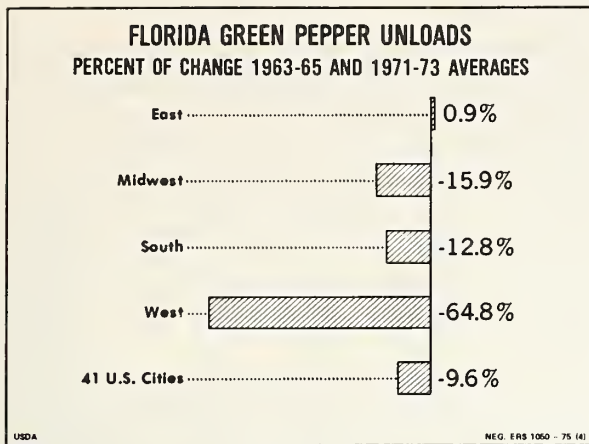


Figure 6

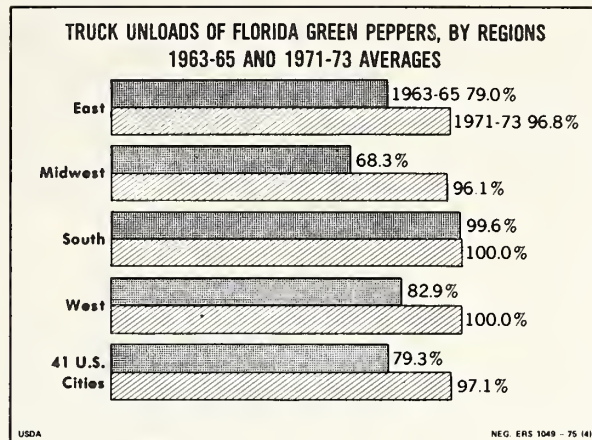


Figure 7

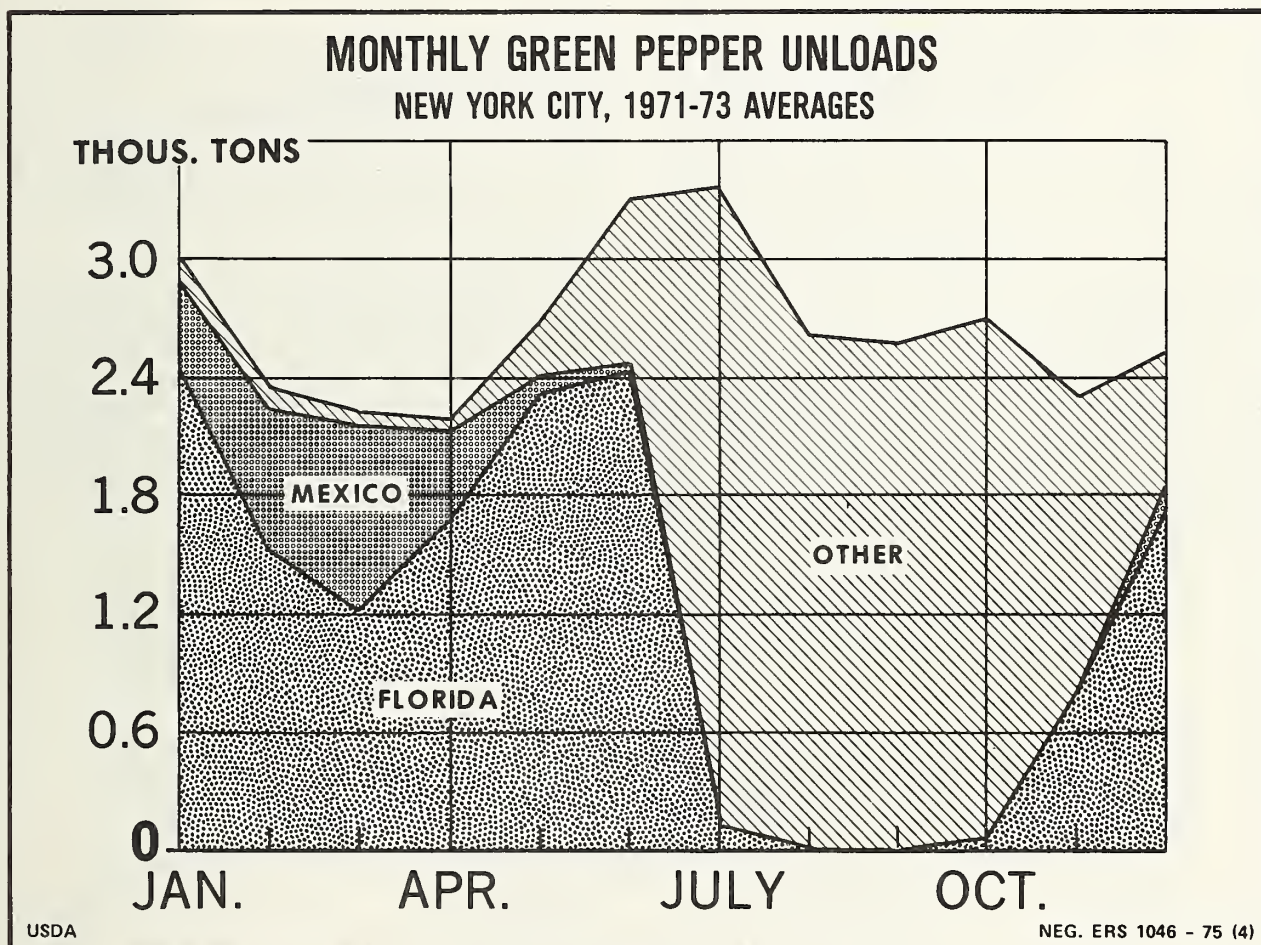


Figure 8

packing and selling costs are reported by the Florida Agricultural Experiment Station. Grower returns are derived from the shipping point price by deducting harvesting, packing, and selling costs. The wholesale-retail margin, derived by deducting wholesale price from retail value, is payment for secondary wholesaling, intracity transportation, and retailing. The shipping point-wholesale margin, derived by deducting shipping point price from wholesale price, is payment for transportation from shipping point and primary wholesaling.

Cucumbers

The retail price of cucumbers in New York City in the fall, winter, and spring months increased on the average about 1 cent a pound per season between 1964/65 and 1973/74. The New York City retail price averaged 32.7 cents per pound in 1973/74, 9.5 cents more than nine seasons earlier (Table 3). The retail value of a 51-pound bushel of cucumbers averaged \$15.35 in 1973/74, 41 percent higher than in 1964/65 (Figure 9). Returns to Florida growers for cucumbers sold in New York City increased 37 percent, from \$2.73 to \$4.23 per bushel. Harvesting, packing, and selling costs rose from \$1.84 to \$2.99, a 62 percent increase. The shipping point-wholesale margin nearly doubled and the wholesale-retail margin increased 13 percent to \$5.63 per bushel in 1973/74. However, a larger wholesale-retail margin existed in three of the last five seasons.

A simple trend line fitted to the data in table 3 indicates that the retail value of cucumbers sold in New York City increased an average of 52 cents per bushel per season since 1964/65. During the same period, the wholesale-retail margin increased 29 cents per bushel per season; the shipping point-wholesale margin rose 2 cents; harvesting, packing, and selling went up 11 cents; and grower returns rose 10 cents.

The market shares or percentage of the retail value going to growers and other market factors fluctuated from season to season, but did not show any significant trend over the period. For the 10 years, the wholesale-retail margin averaged 40 percent of the retail value; the shipping point-wholesale margin, 16 percent;

harvesting, packing, and selling costs, 17 percent; and grower returns, 27 percent.

Green Peppers

Winter and spring green pepper prices increased sharply at all levels between 1964 and 1974, with most of the increase occurring after 1969. The retail price of green peppers in New York City rose to 55.5 cents a pound in 1974, 62 percent higher than in 1964, again with most of the increase dating after 1969 (table 4). The retail price in 1970 increased to 58.9 cents a pound, 19.3 cents higher than a year earlier, resulting from the sharp drop in Florida green pepper supplies. Florida pepper supplies increased and retail prices declined slightly after 1970.

The retail value of a 30-pound bushel of green peppers averaged \$15.32, sharply higher than 10 seasons earlier (Figure 10). Florida grower returns averaged \$4.76 per bushel in 1974, about one-third more than in 1964. However, grower returns were more than double the 1964 level in both 1970 and 1971. Harvesting, packing, and selling costs in 1974 were about three-fourths more than 1964. The wholesale-retail margin was about two-thirds larger and the shipping point-wholesale margin more than doubled during the period.

A simple trend analysis indicates that the retail value of green peppers sold in New York City increased an average of 78 cents a bushel per season during 1964-74. During that period, grower returns increased 26 cents a bushel per season; the wholesale-retail margin went up 28 cents; the shipping point-wholesale margin rose 16 cents; and harvesting, packing, and selling costs went up 8 cents.

The shipping point-wholesale margin's share of the retail value of green peppers increased on the average about one-half of a percentage point per season. Other market shares declined slightly, but not by a significant amount. For the period, the wholesale-retail margin averaged 39 percent of the retail value; the shipping point-wholesale margin, 11 percent; harvesting, packing, and selling costs, 13 percent; and grower returns 37 percent.

Table 3—Florida cucumbers, fall, winter, and spring: Seasonal average prices, margins, costs, and returns, New York City¹

Season	Retail price	Retail value	Wholesale-retail margin ³		Shipping point-wholesale margin ⁴		Harvesting, packing and selling costs ⁵		Grower returns ⁶	
	Per pound	Per bushel ²	Per bushel	Percent- age of retail value	Per bushel	Percent- age of retail value	Per bushel	Percent- age of retail value	Per bushel	Percent- age of retail value
	Cents	Dollars	Dollars	Percent	Dollars	Percent	Dollars	Percent	Dollars	Percent
1964/65	23.2	10.88	5.00	46	1.31	12	1.84	17	2.73	25
1965/66	24.4	11.44	3.52	31	3.36	29	1.86	16	2.70	24
1966/67	22.3	10.46	3.32	32	1.46	14	1.94	18	3.74	36
1967/68	22.1	10.37	4.56	44	1.50	14	2.05	20	2.26	22
1968/69	29.0	13.61	3.97	29	2.61	19	2.06	15	4.97	37
1969/70	28.9	13.56	6.44	47	1.49	11	2.16	16	3.47	26
1970/71	28.6	13.42	5.63	42	2.05	15	2.43	18	3.31	25
1971/72	29.7	13.94	6.27	45	1.89	13	2.48	18	3.30	24
1972/73	30.3	14.21	6.48	46	2.02	14	2.61	18	3.10	22
1973/74 ⁷	32.7	15.35	5.63	37	2.50	16	2.99	19	4.23	28

¹ 7-month weighted average (Nov.-May), 51 pounds net weight per bushel. ² Returns to retailer for salable cucumbers (8 percent allowance for loss incurred during marketing process).

³ Retail price minus wholesale price (the amount received for secondary wholesaling, intra city transportation, and retailing).

⁴ Wholesale price minus shipping point price (the amount received for transportation from shipping points and primary

wholesaling). ⁵ Weighted average computed from Brooke, D. L., "Costs and Returns from Vegetable Crops in Florida, Season 1972/73. With Comparisons, Fla. Agr. Expt. Sta., Economics Rpt. 59, March 1974 (also similar reports for earlier years).

⁶ Derived by deducting harvesting, packing, and selling costs from shipping point price. ⁷ Preliminary.

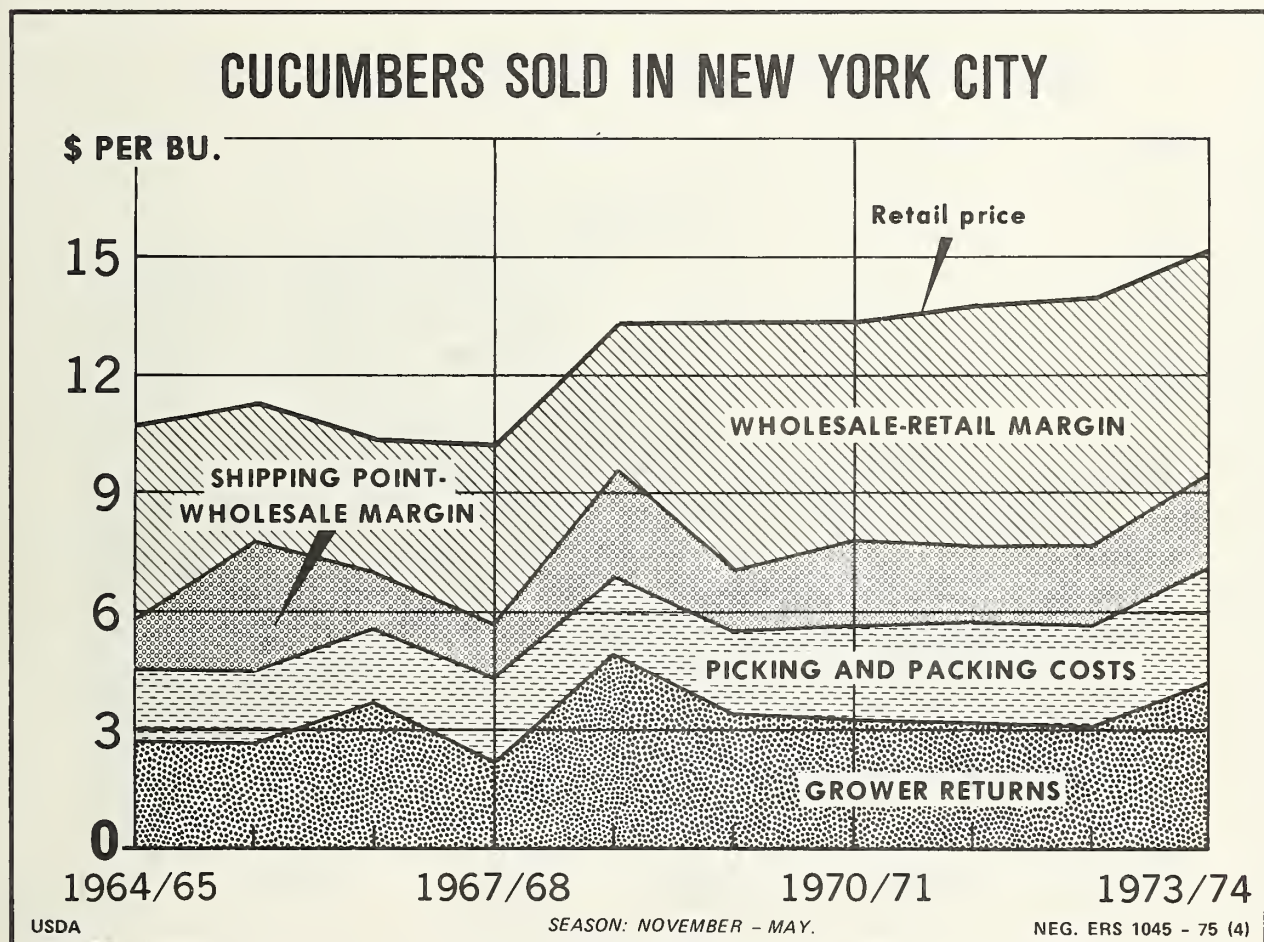


Figure 9

Table 4—Florida green peppers, winter and spring: Seasonal average prices, margins, costs and returns, New York City¹

Season	Retail price	Retail value	Wholesale-retail margin ³		Shipping point-wholesale margin ⁴		Harvesting, packing and selling costs ⁵		Grower returns ⁶	
	Per pound	Per bushel ²	Per bushel	Percent- age of retail value	Per bushel	Percent- age of retail value	Per bushel	Percent- age of retail value	Per bushel	Percent- age of retail value
	Cents	Dollars	Dollars	Percent	Dollars	Percent	Dollars	Percent	Dollars	Percent
1964	34.2	9.44	3.95	42	0.73	8	1.18	12	3.58	38
1965	33.0	9.11	3.52	39	.96	10	1.42	16	3.21	35
1966	36.2	9.98	4.19	42	.90	9	1.39	14	3.50	35
1967	35.3	9.76	3.99	41	.95	10	1.40	14	3.42	35
1968	38.6	10.65	3.76	35	1.37	13	1.52	14	4.00	38
1969	39.6	10.93	5.03	46	.88	8	1.62	15	3.40	31
1970	58.9	16.26	5.48	34	1.74	11	1.87	11	7.17	44
1971	58.1	16.04	5.09	32	1.20	7	1.78	11	7.97	50
1972	51.4	14.19	5.47	38	2.39	17	1.68	12	4.65	33
1973	56.6	15.62	5.91	38	2.68	17	1.93	12	5.10	33
1974 ⁷	55.5	15.32	6.54	43	1.97	13	2.05	13	4.76	31

¹ 6-month weighted average (Jan.-June), 30 pounds net weight per bushel. ² Returns to retailer for salable peppers (8-percent allowance for loss incurred during marketing process).

³ Retail price minus wholesale price. (The amount received for secondary wholesaling, intra city transportation and retailing).

⁴ Wholesale price minus shipping point price (the amount received for transportation from shipping point and primary

wholesaling). ⁵ Weighted average computed from Brooke, D. L., Costs and Returns from Vegetable Crops in Florida, Season 1972-73 With Comparisons, Fla. Agr. Expt. Sta., Economics Rpt. 59, Mar. 1974. (also similar reports for earlier years).

⁶ Derived by deducting harvesting, packing, and selling costs from shipping point price. ⁷ Preliminary.

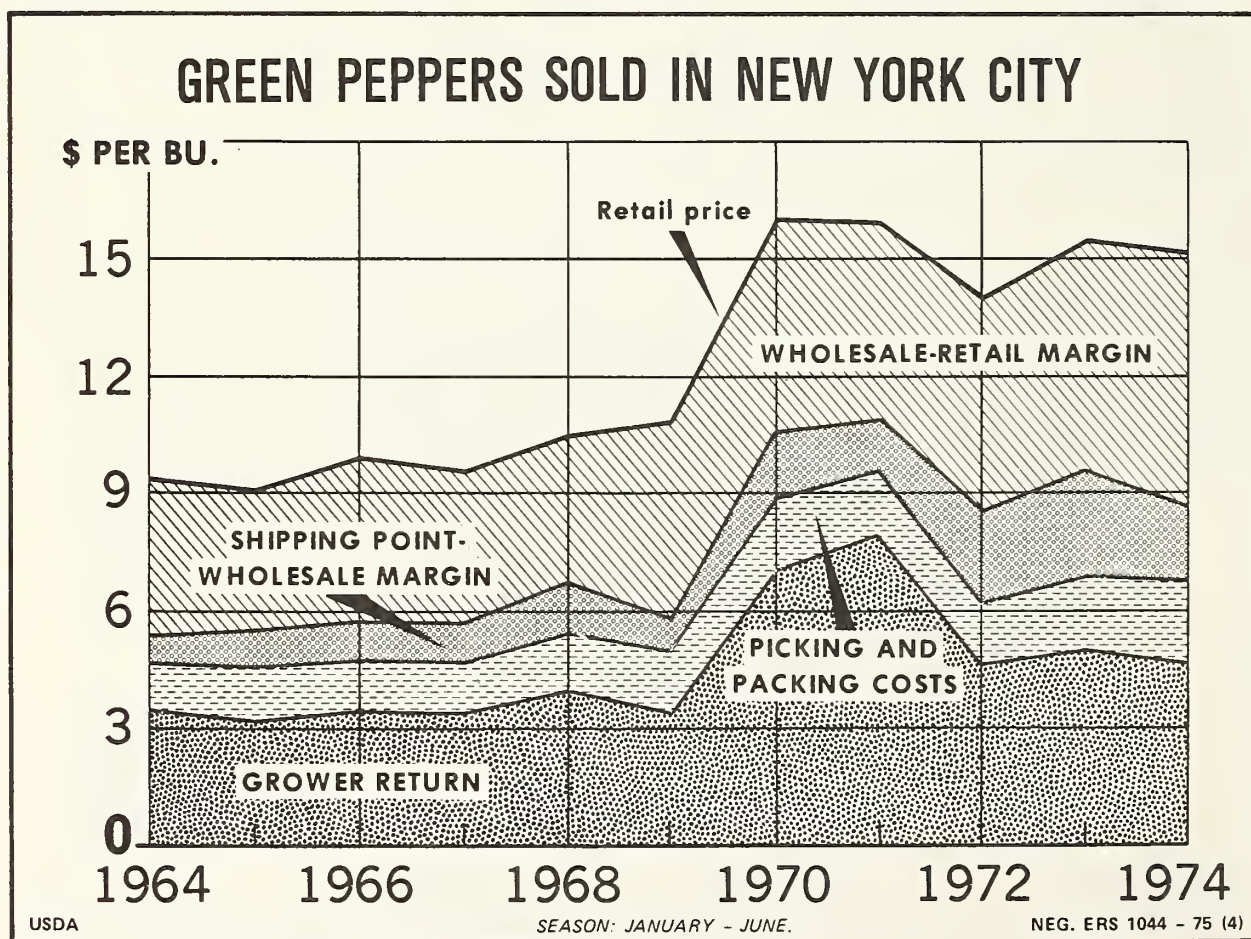


Figure 10

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